

UFI Global Exhibition Barometer

 **ufi** The Global
Association of the
Exhibition Industry

24th Edition

Report based on the results of a survey
concluded in January 2020

 **ufi** The Global
Association of the
Exhibition Industry

Global

 **AAEXO** ASSOCIATION OF
AFRICAN EXHIBITION
ORGANISERS

 **EXSA**

Southern Africa

 **AEO** ASSOCIATION
OF EVENT
ORGANISERS

United Kingdom

 **AFIDA**

Central &
South America

 **AMPROFEC**

Mexico

 **ASPERAPI**
I ECA


Indonesia

 **EXHIBITION & EVENT**
ASSOCIATION OF AUSTRALASIA

Australia

 **IEIA** Indian
Exhibition
Industry
Association
The Gateway To Indian Trade Shows

India

 **Japan Exhibition Association**
—日本展示会協会—

Japan

 **Macau Association of Exhibitors and Event Organisers**
—澳門展覽會協會—

Macau

 **RUSSIAN UNION OF**
EXHIBITIONS AND FAIRS

Russia

 **SISO** SOCIETY OF INDEPENDENT SHOW ORGANISERS

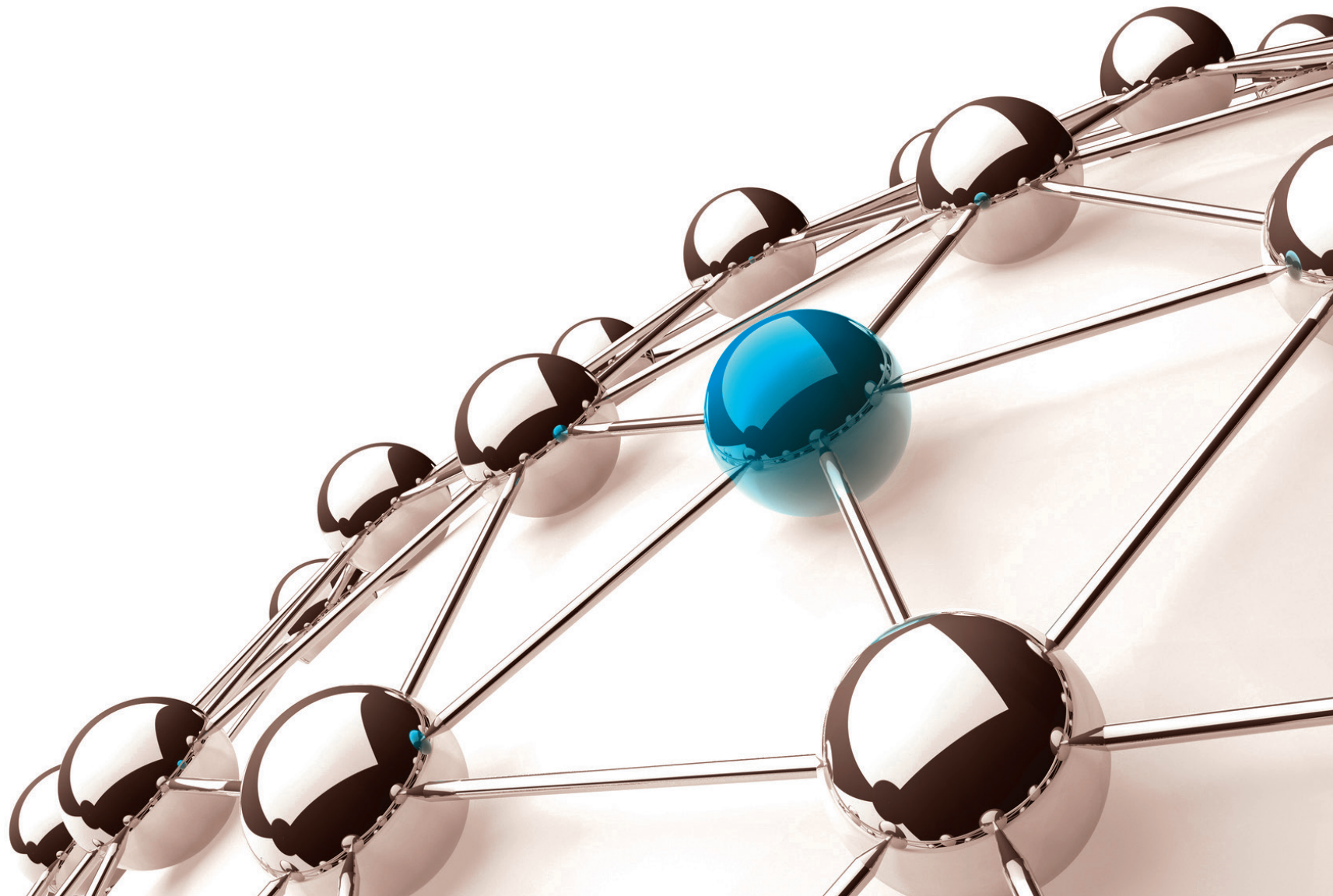
US

 **TEA** THE EXHIBITION ASSOCIATION OF THAILAND

Thailand

 **UBRAFE** União Brasileira dos Promotores de Feiras

Brazil



Global Reports



Analysing the global exhibition industry with global comparisons.

Global Barometer – Bi-annual report on industry developments.

World Map of Venues – Report on trends in venue space and project developments globally.

Economic Impact Study – Report on the value of exhibitions globally and regionally.

United Nations Sustainable Development Goals – Reports on the economic, social & environmental impacts of a number of exhibition industry projects.

Regional Reports



Regular market overviews on UFI's chapter regions.

Euro Fair Statistics – Annual list of certified data for Europe by country.

The Trade Fair Industry in Asia – Annual analysis of market developments for Asia/Pacific by country.

The Exhibition Industry in MEA – Overview of the exhibition market in the MEA region.

The Exhibition Industry in Latin America – The first comprehensive overview by UFI of the exhibition industry in Latin America.

Topical Reports



Focused reports on challenges and developments within the exhibition industry.

Global Visitor Insights & Global Exhibitor Insights – Data driven research reports on visitor feedback and exhibitor expectations.

Best Practices Compendiums – Case studies of successful industry developments.

Special Industry Topics – A wide ranging selection of bespoke reports into specific industry topics.

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www.ufi.org/research

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Results by region

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Evolution of the Business Model for Exhibitions	12
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Detailed results for selected countries or zones

North America: Mexico, US	25
Central and South America: Argentina, Brazil, Colombia, other countries in South America	29
Europe: Germany, Italy, Russia, UK, other countries in Europe	37
Africa: South Africa	47
Middle East: UAE, other countries in the Middle East	49
Asia - Pacific: Australia, China, India, Indonesia, Japan, Macau, Thailand, other countries in Asia - Pacific	53

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Welcome to the 24th edition of the “UFI Global Exhibition Barometer” survey. This study is based on a global survey, concluded in January 2020. It represents up-to-date information on the development and outlook of the global exhibition industry as well as on 22 specific countries and zones.

UFI began assessing the impact of the global economic conditions on the exhibition industry twice a year in 2009. Since then, it has regularly grown in size and scope, as numerous industry associations around the world have joined the project.

These associations are AAXO (The Association of African Exhibition Organizers) and EXSA (Exhibition and Events Association of Southern Africa) in South Africa, AEO (Association of Event Organisers) in the UK, AFIDA (Asociación Internacional de Ferias de América) in Central and South America, AMPROFEC (Asociación Mexicana de Profesionales de Ferias y Exposiciones y Convenciones) in Mexico, EEAA (The Exhibition and Event Association of Australasia) in Australasia, IECA (Indonesia Exhibition Companies Association) in Indonesia, IEIA (Indian Exhibition Industry Association) in India, JEXA (Japan Exhibition Association) in Japan, MFTA (Macau Fair Trade Association) in Macau, RUEF (Russian Union of Exhibitions and Fairs), SISO (Society of Independent Show Organizers) for the UK, TEA (Thai Exhibition Association) in Thailand and UBRAFE (União Brasileira dos Promotores Feiras) in Brazil.

Important remarks

It should be noted that the number of replies to the current survey (438 from 70 countries/regions - see full list at the end of the document) provides representative results. However, the consolidated regional results may not reflect the situation of specific countries in that region. This is why the report also includes a set of detailed results for the 22 countries or zones where a significant number of answers were obtained.

Questions related to this survey can be addressed to Christian Druart, UFI Research Manager, at research@ufi.org.

This research is available online at www.ufi.org/research.

The 24th Barometer surveyed the evolution of participants' gross turnover expectations for the second half of 2019 and the two halves of 2020 and compared to their turnover during the same period in the previous year (regardless of possible biennial effects).

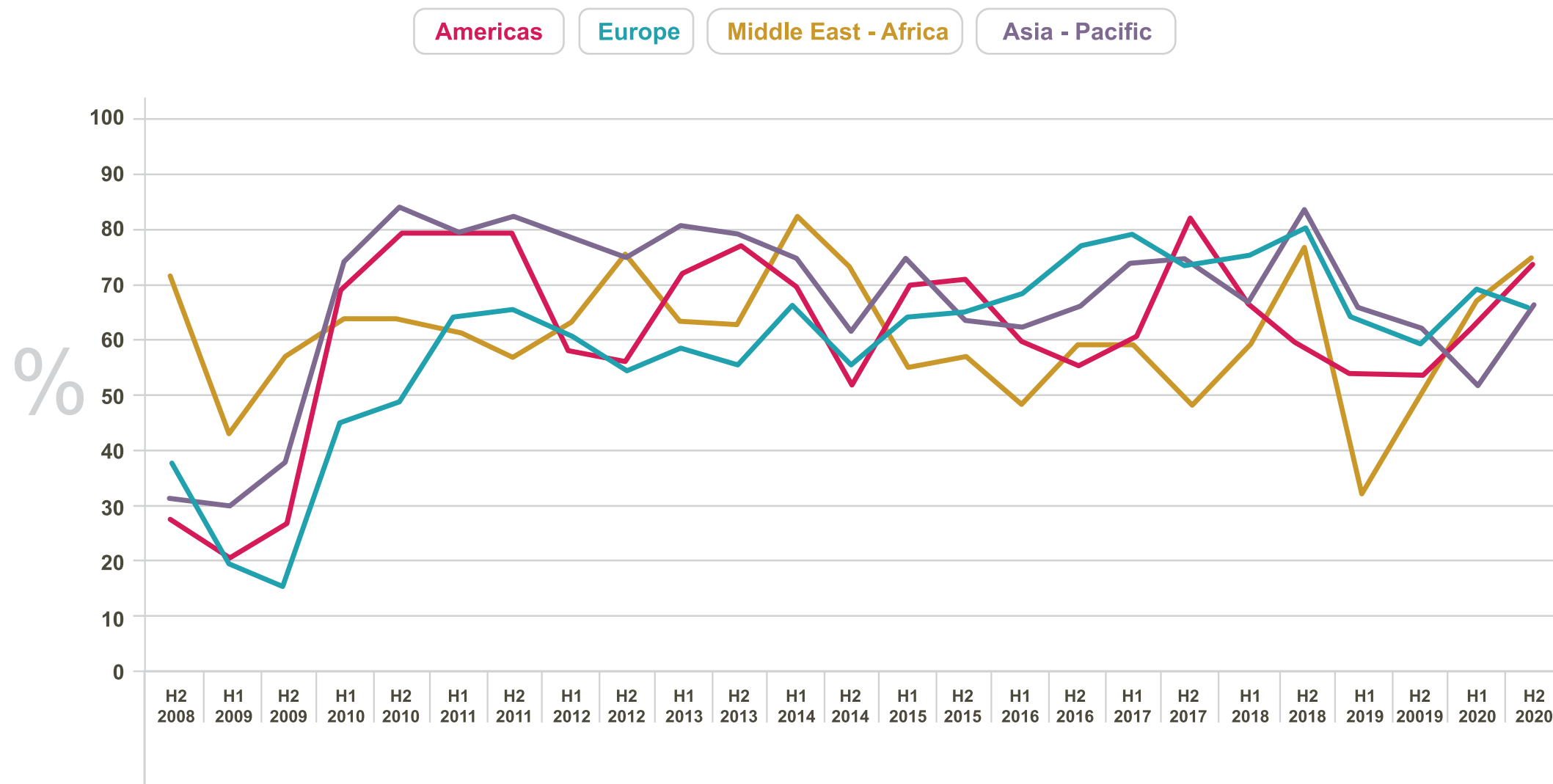
The following chart presents, at regional level, the percentage of companies declaring an increase in their turnover. It combines these results with those of previous surveys since 2008 and it does not take into account the “unknown” or “not applicable” answers.

In all regions, a majority of the companies, who could assess their turnover, expect Gross Turnover increases. However, the detailed charts included in the second part of this report, which also identify the “unknown” answers, highlight a strong level of uncertainty in many countries, especially in Asia/Pacific and Latin America.

As a result:

- **Eight of the selected countries have, for the three periods surveyed, a majority of companies declaring turnover increases: Australia, Brazil, Germany, India, Indonesia, Russia, UAE and USA**
- **Significant levels of uncertainty over the period are recorded in Argentina, China, Macau, Japan, Mexico and the UK.**

% of companies declaring an increase in turnover when compared to their projections for the same period the year before (regardless of possible biennial effects)



Development of Operating Profits

The 24th Global Barometer survey questioned the evolution of operating profits for 2019 compared to the previous year.

The following chart combines these results with those of previous surveys, which track the development of operating profits since 2009. It highlights the results of companies declaring an increase of more than 10% and those declaring a stable result (between -10% and +10%). The charts included in the second part of this report (“Detailed results for selected countries or zones”) detail these results, adding the percentage of companies with reductions in profits or losses.

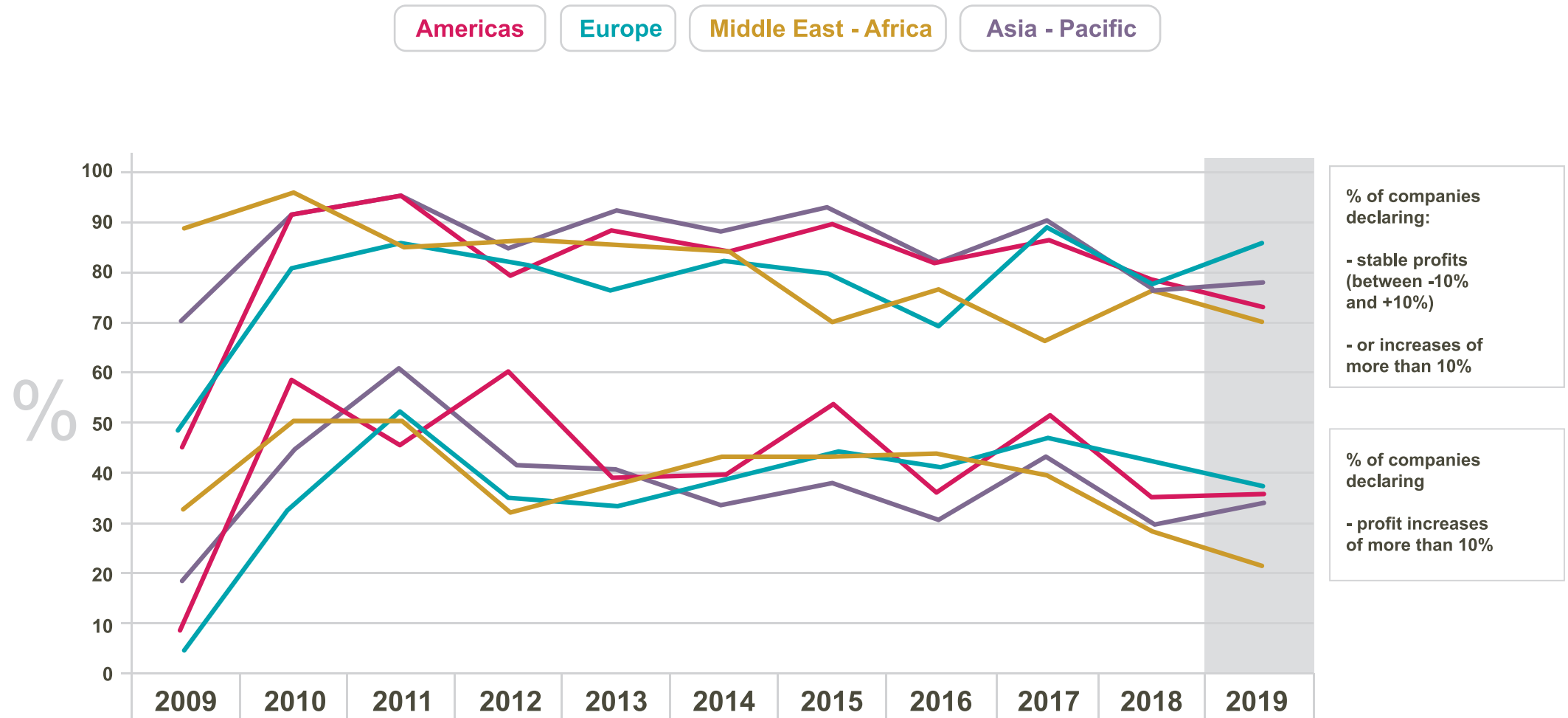
The results show that:

In each of the four regions, at least 70% of companies maintained a good level of performance in 2019 compared to 2018.

The highest proportions of companies declaring an increase of more than 10% of their operating profits observed in the USA (62%), Brazil (50%), Germany (42%), Thailand (42%) and India (41%).

On the opposite side, the lowest proportions are in Indonesia (29%), Russia (29%), Australia (28%), South Africa (24%), UAE (11%), Macau (0%) and the UK (0%).

Operating Profits compared to the previous year



Most Important Business Issues

Companies were asked to identify the three most important issues for their business in the coming year from a pre-defined list of seven issues. Multiple choices were proposed to get further insights for some answers.

As in previous surveys, around the 80% of all answers relate to the following 4 issues:

- **“State of the economy in home market” (26% in the current survey, up 2% compared to 6 months ago);**
- **“Competition from within the industry” (20% in the current survey, up to 1% compared to 6 months ago);**
- **“Global economic developments” (19% in the current survey, same compared to 6 months ago);**
- **“Internal challenges” (16% in the current survey, down 1% compared to 6 months ago), where “Human resources” are named as the most important aspect.**

“Impact of digitisation” (“Responding to customer digitisation needs”, “New digital products” or “Internal processes”), “Competition with other media” (“Internet”, “Social media”, “Virtual trade shows” or “Other”) and “Regulatory / Stakeholders issues” (“Sustainability”, “Health & safety” or “Other”) keep similar levels to the last survey.

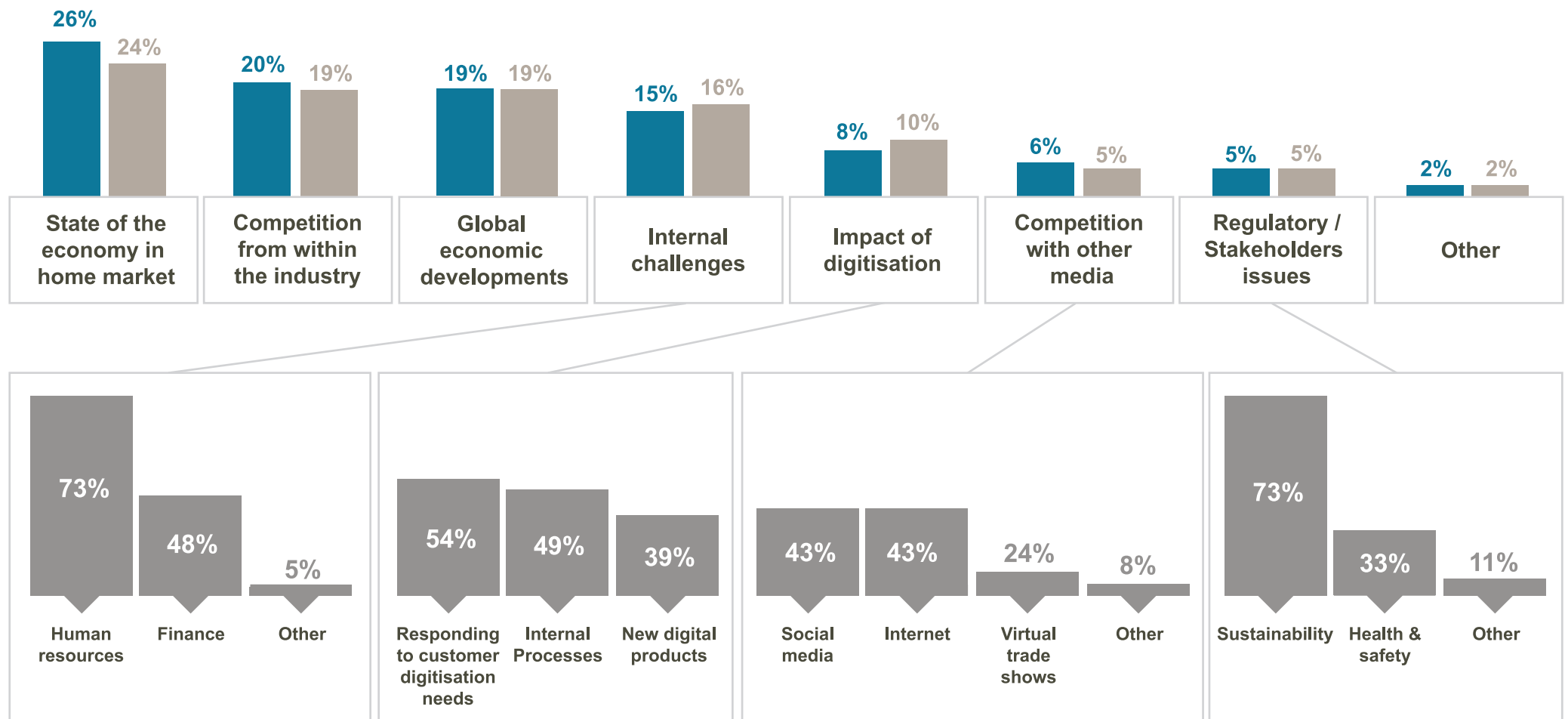
The following pages show the consolidated global results, including further insights. They also detail those results by region and by type of activity (for 3 main segments: “Organiser”, “Venue only” and “Service provider only”). The results show some differences:

- **“Internal Challenges” in Asia/Pacific, and “Global economic developments” in the Americas rank as the second most important issue, before “Competition from within the industry”.**
- **“Internal challenges” is the most important issue for venues.**

Top Issues: Global Results

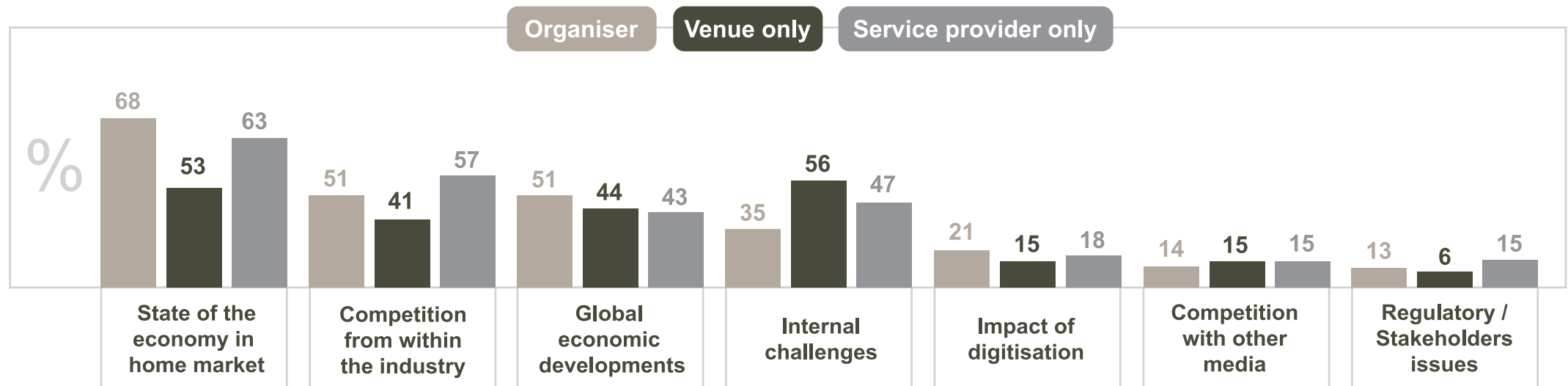
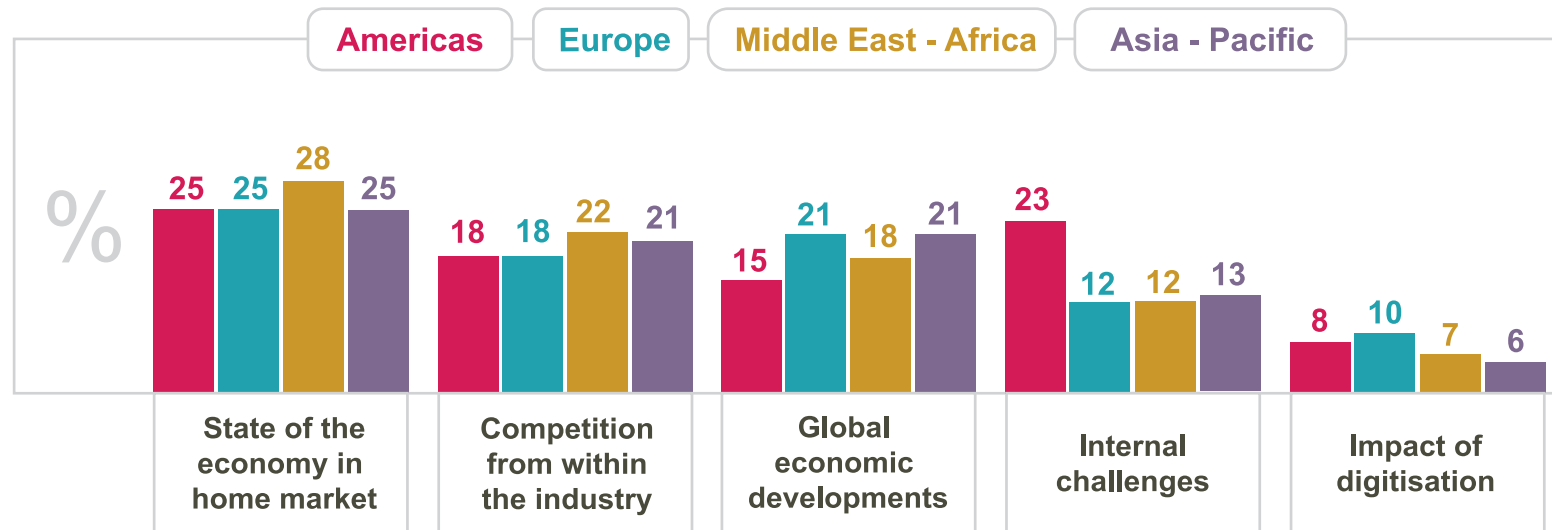
Results from current survey – January 2020

Results from last survey - July 2019



(multiple answers possible)

Most important issues: detail by region and type of activity for the five top issues identified globally



The business model for exhibitions is evolving, with the development of features such as conference stages on and near the show floor, open meeting spaces (places where participants can meet without prior arrangement), catering/designated food spaces, or off main site events.

The 24th Global Barometer survey questioned companies in order to assess the levels of implementation of these features, and the share of available space used for them.

The global and regional results are presented in the next five pages, whereas several detailed results are provided in the country profiles section of the report. These questions were primarily targeting exhibition organisers and not all survey respondents answered them. Still, the number of answers received (more than 200 for both) represents a good sample of global and regional results (see footnote).

Results indicate a major use of “conference stages on and near the show floor” (3.6 out of a scale of 5), followed by “open meeting spaces” (2.9) and “catering/designated food spaces” (2.8). “Off main site events” are, in comparison, less often implemented (2.0).

Among all the zones where the level of answers was considered sufficient, implementation rates significantly higher than the global average were identified:

- For “conference stages on and near the show floor”: in USA (4.3), Germany (4.0) and UAE (4.0)
- For “open meeting spaces”: UAE (3.9), Japan (3.3), Thailand (3.3), USA (3.3) and UK (3.3)
- For “catering/designated food spaces”: India (3.5), Italy (3.5) and Russia (3.4)
- For “Off main site events”: UAE (4.0) and China (2.5).

Results also indicate that these features occupy on average less than 10% of the total space of the exhibitions. This is the case for:

- **91% of companies for “catering/designated food spaces”**
- **88% for “off main site events”**
- **80% for “open meeting spaces”**
- **62% for “conference stages on and near the show floor”.**

Among all the zones where the level of answers was considered sufficient, the following countries appear to allocate more than 10% of their total event space to the respective features:

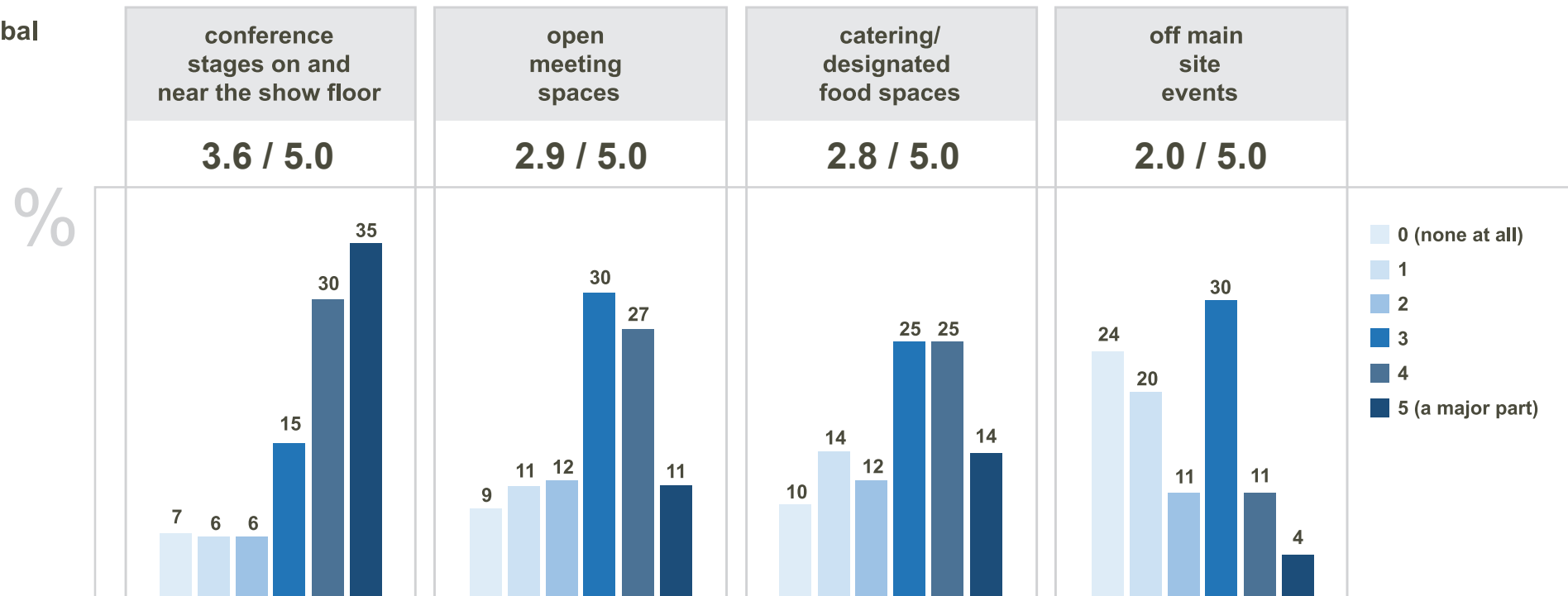
- for “conference stages on and near the show floor”: China (64% of companies), UAE (63%) and Australia (55%)
- for “open meeting spaces”: Thailand (63% of companies) and Japan (33%)
- for “catering/designated food spaces”: Thailand (33%), Italy (20%) and Australia (15%)
- for “off main site events”: Thailand (40%)

Footnote: Results were not considered representative for a few countries where regional results are shown instead (see respective pages).

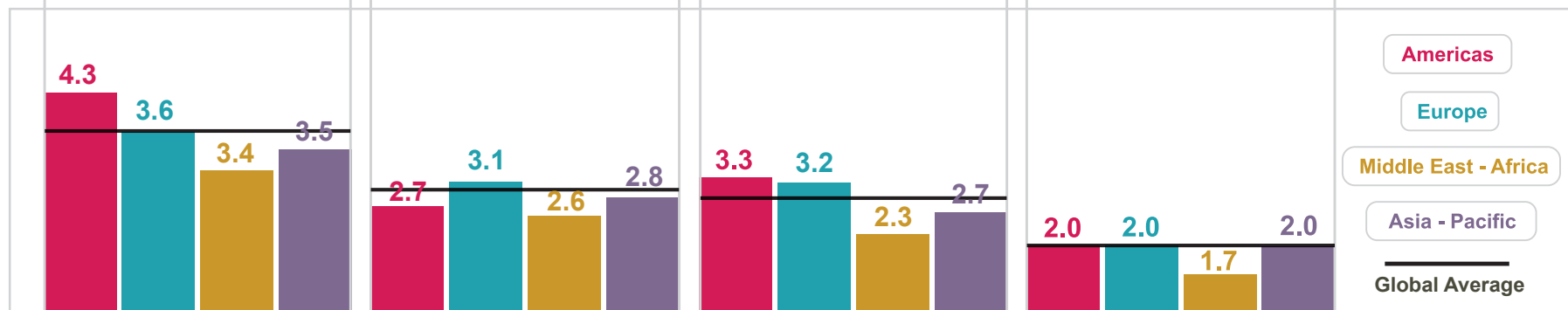
Evolution of the Business Model for Exhibitions

To what degree have you added the following elements to your shows

Global



By Region

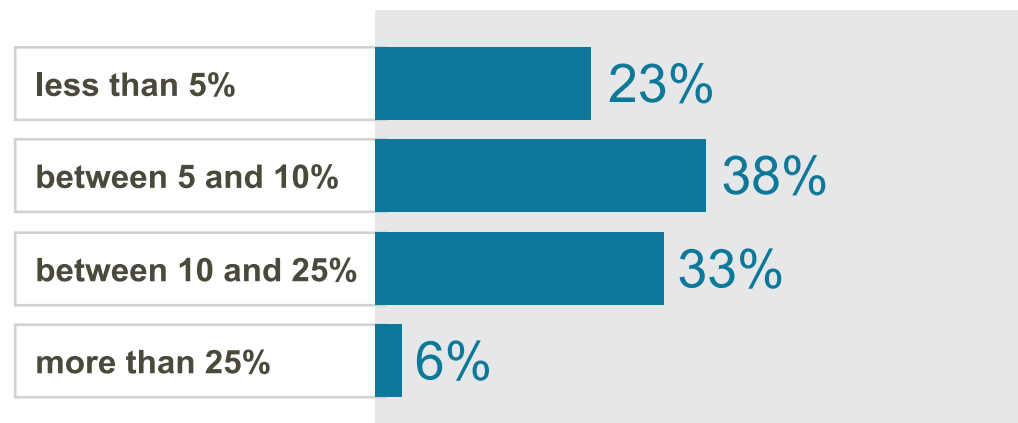


Evolution of the Business Model for Exhibitions

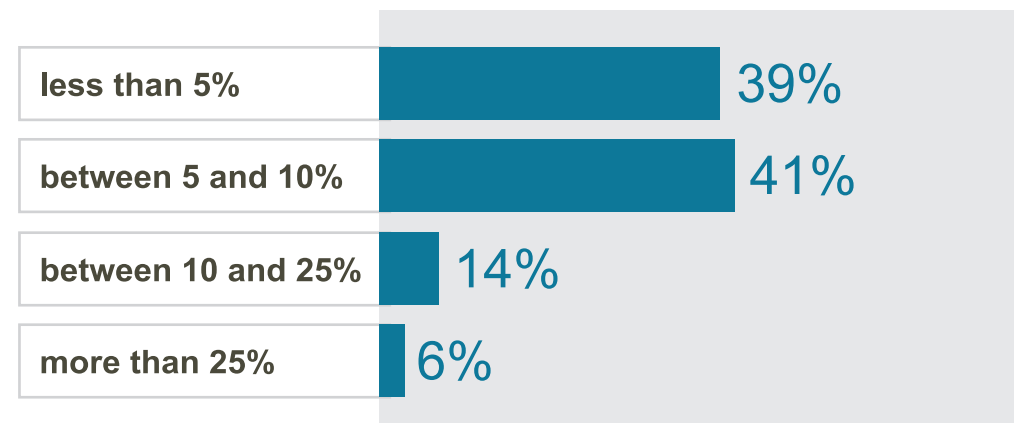
What share of your total space available is used for the respective purposes during your exhibitions?

Global

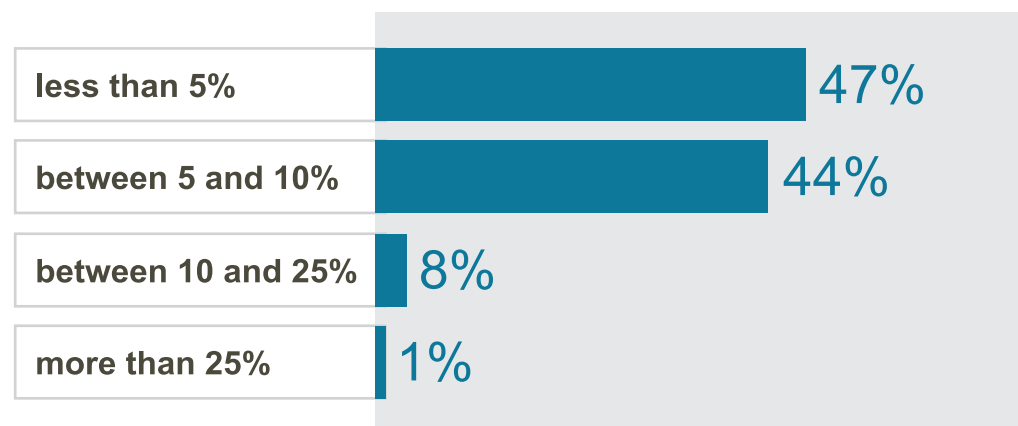
Conference stages on and near the show floor



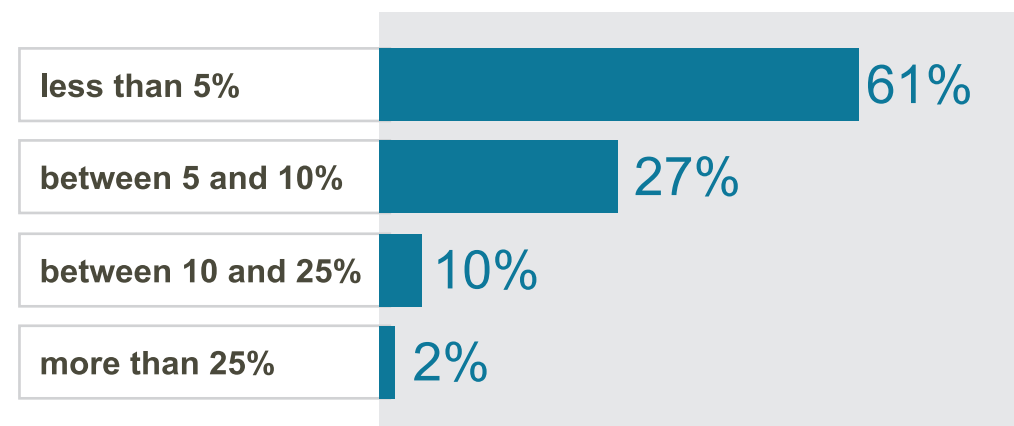
Open meeting spaces



Catering / designated food spaces



Off main site events



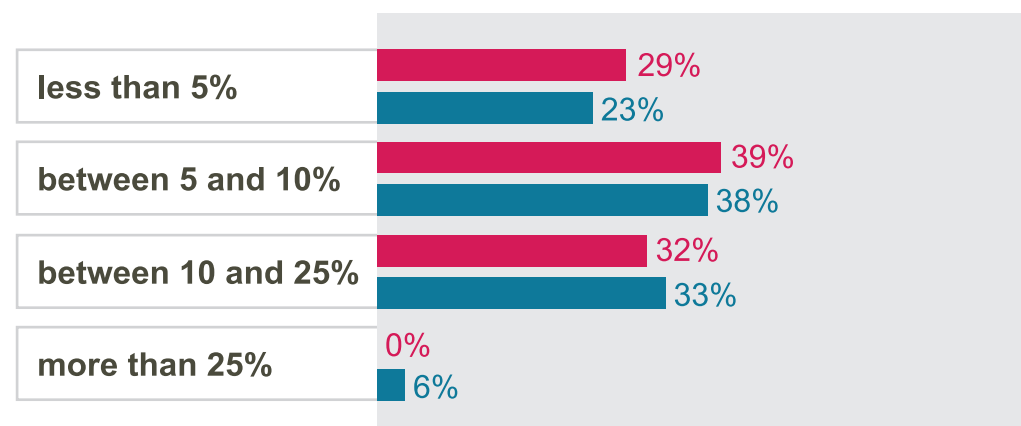
Evolution of the Business Model for Exhibitions

What share of your total space available is used for the respective purposes during your exhibitions?

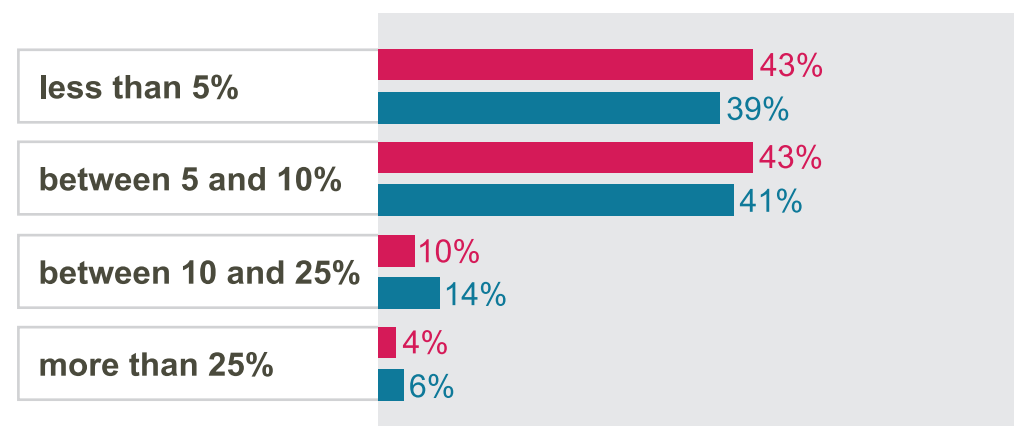
Americas

Global

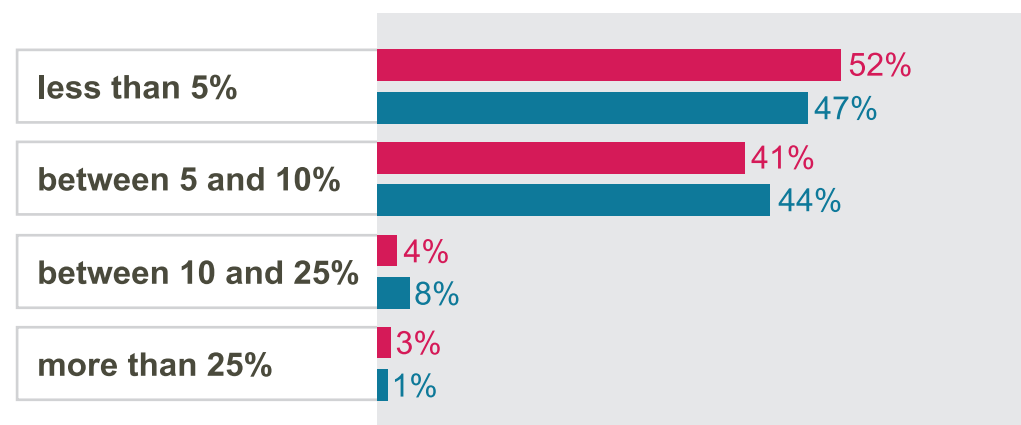
Conference stages on and near the show floor



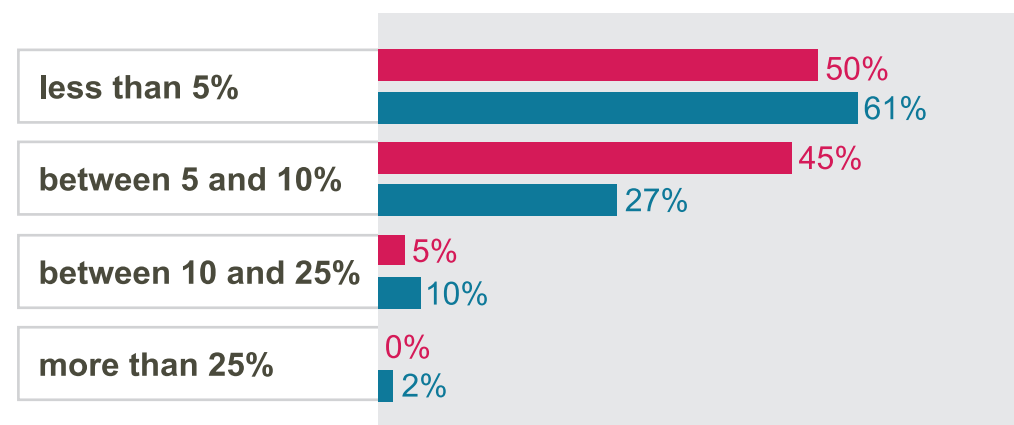
Open meeting spaces



Catering / designated food spaces



Off main site events

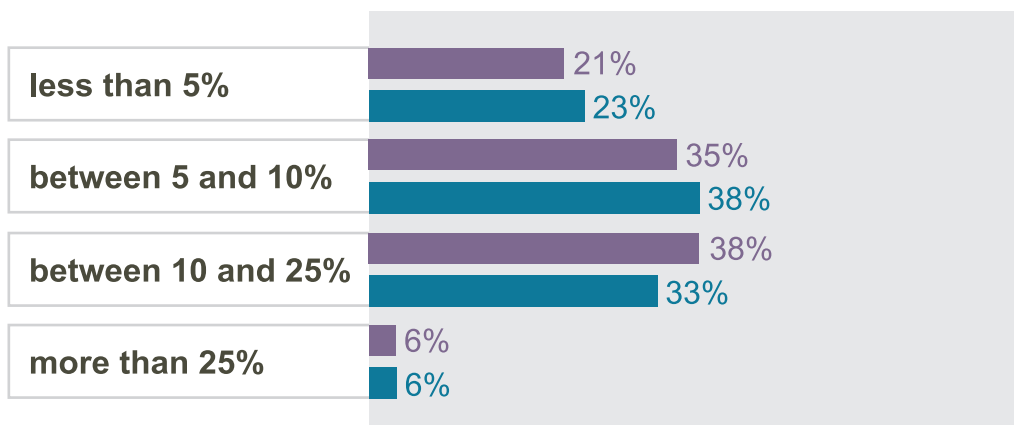


Evolution of the Business Model for Exhibitions

What share of your total space available is used for the respective purposes during your exhibitions?

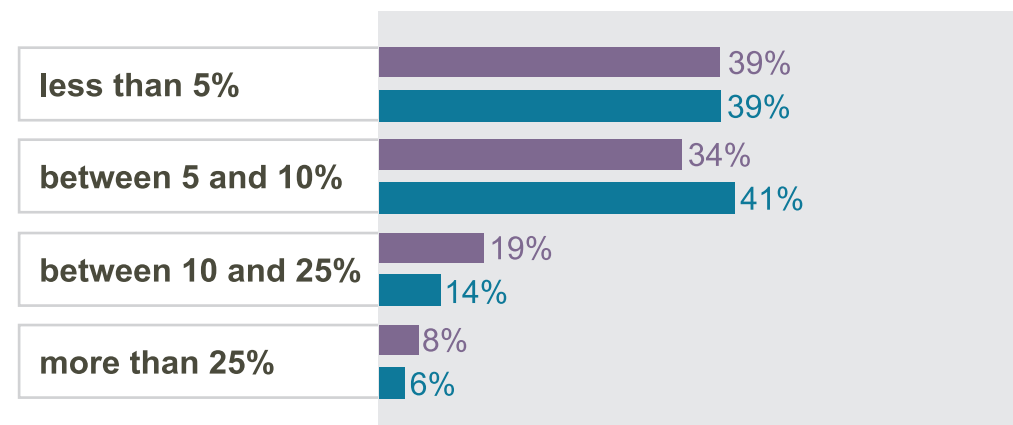
Asia - Pacific

Conference stages on and near the show floor

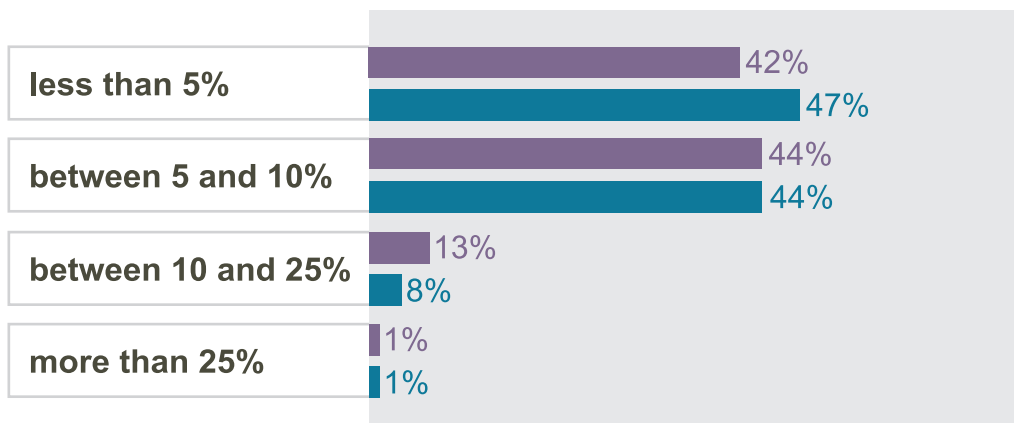


Open meeting spaces

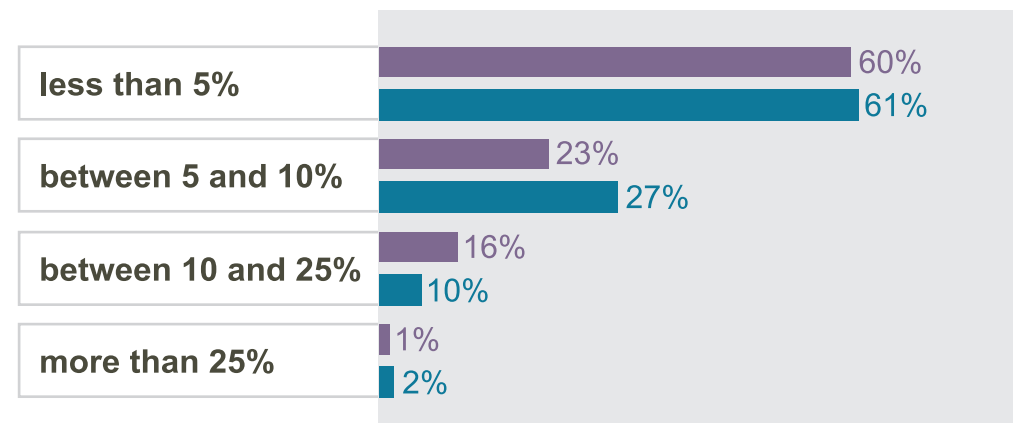
Global



Catering / designated food spaces



Off main site events



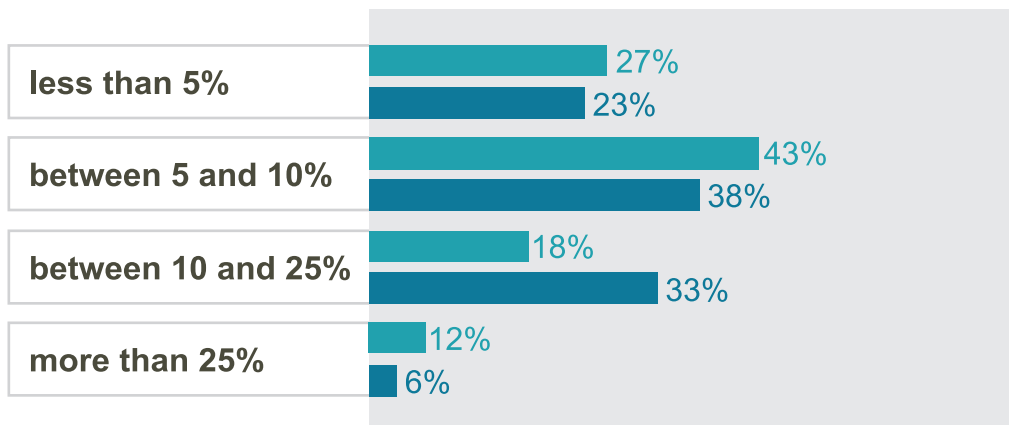
Evolution of the Business Model for Exhibitions

What share of your total space available is used for the respective purposes during your exhibitions?

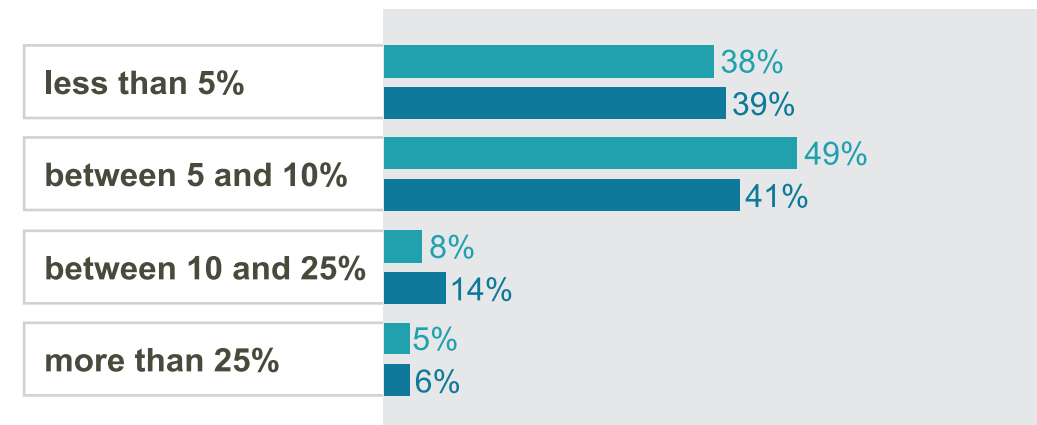
Europe

Global

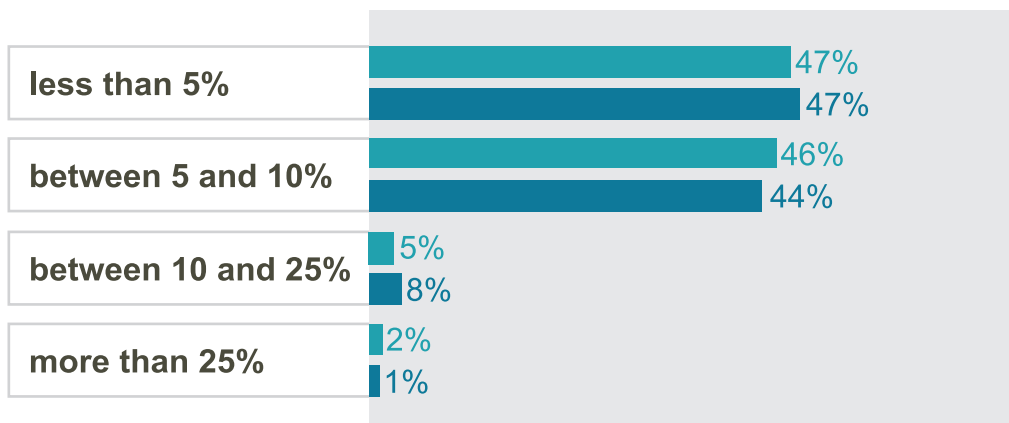
Conference stages on and near the show floor



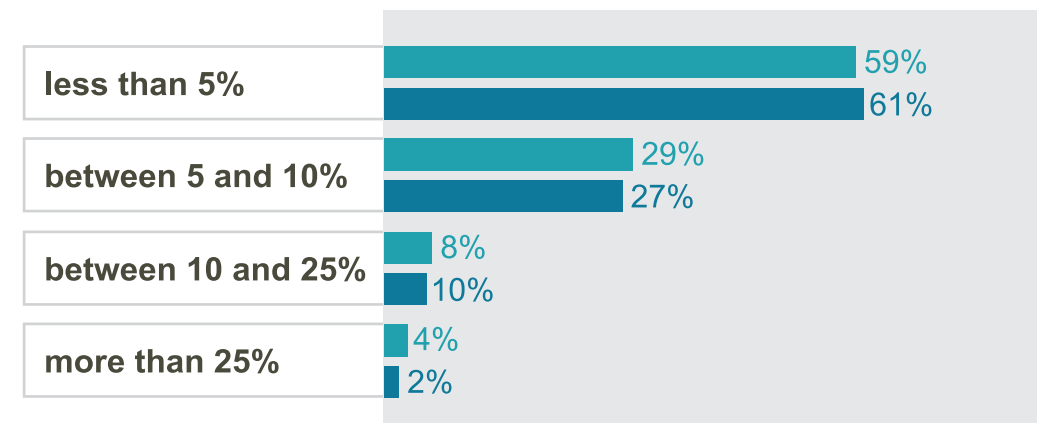
Open meeting spaces



Catering / designated food spaces



Off main site events



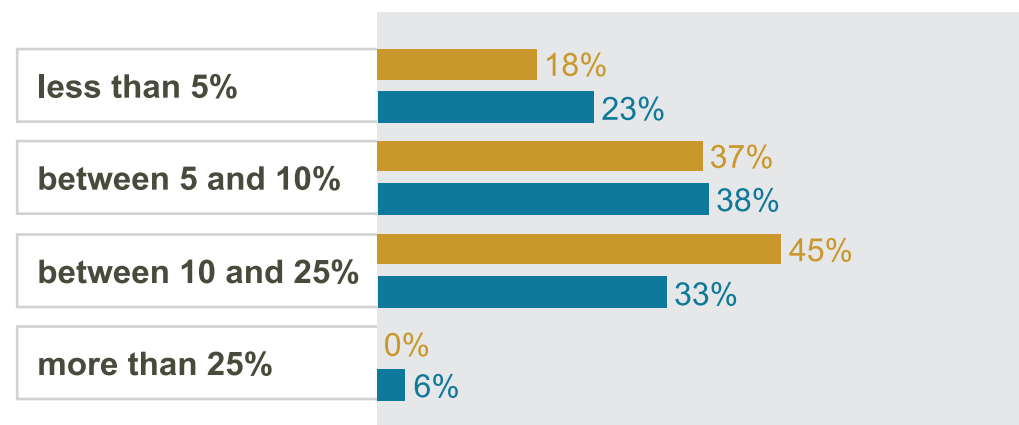
Evolution of the Business Model for Exhibitions

What share of your total space available is used for the respective purposes during your exhibitions?

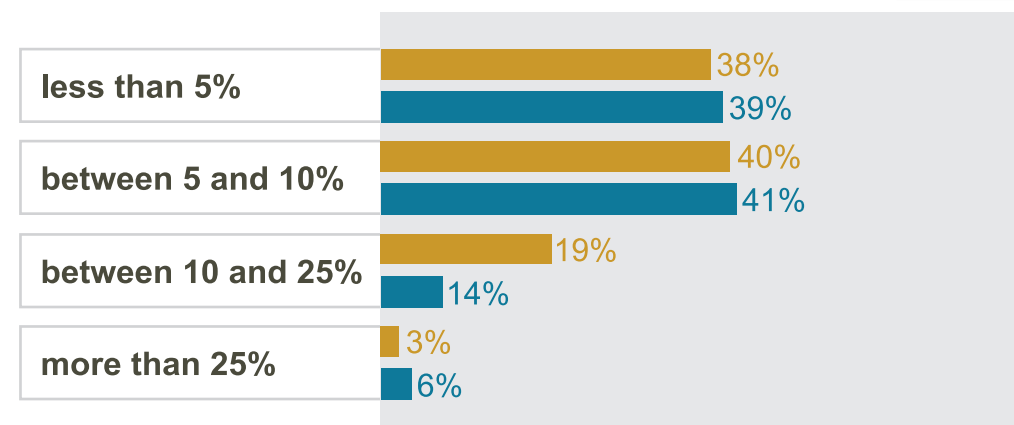
**Middle East
- Africa**

Global

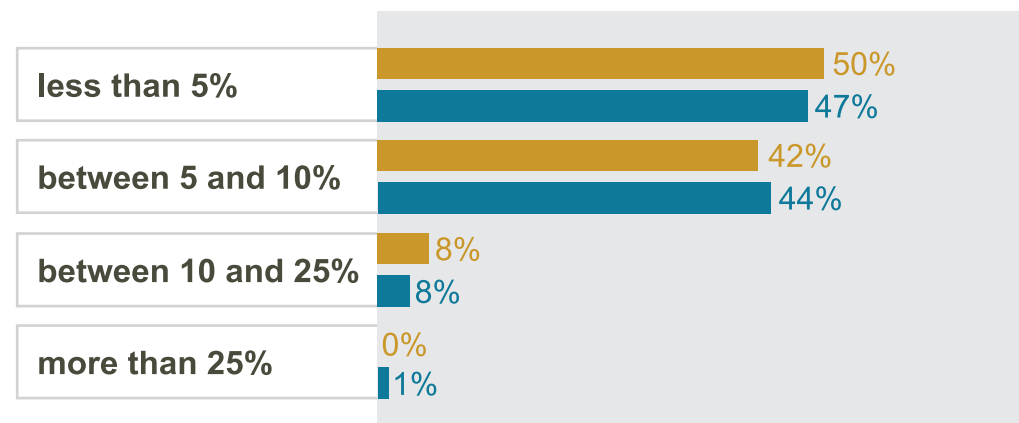
Conference stages on and near the show floor



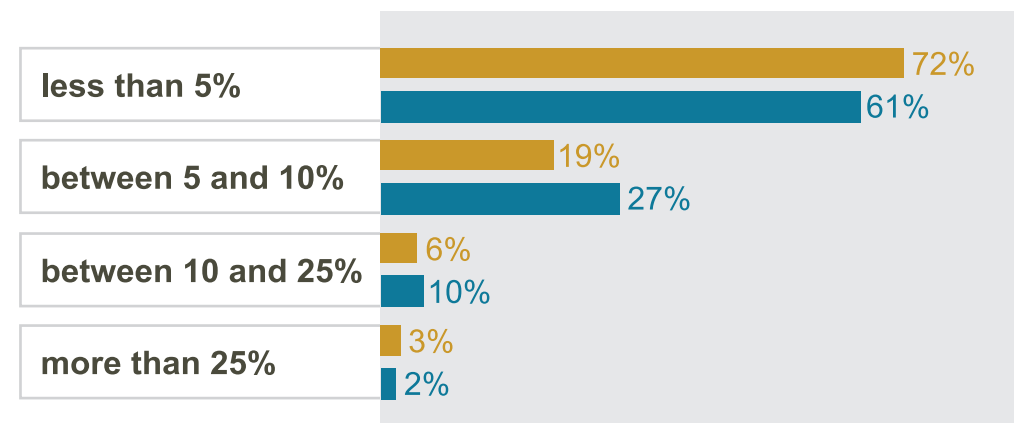
Open meeting spaces



Catering / designated food spaces



Off main site events



Priorities in terms of strategy

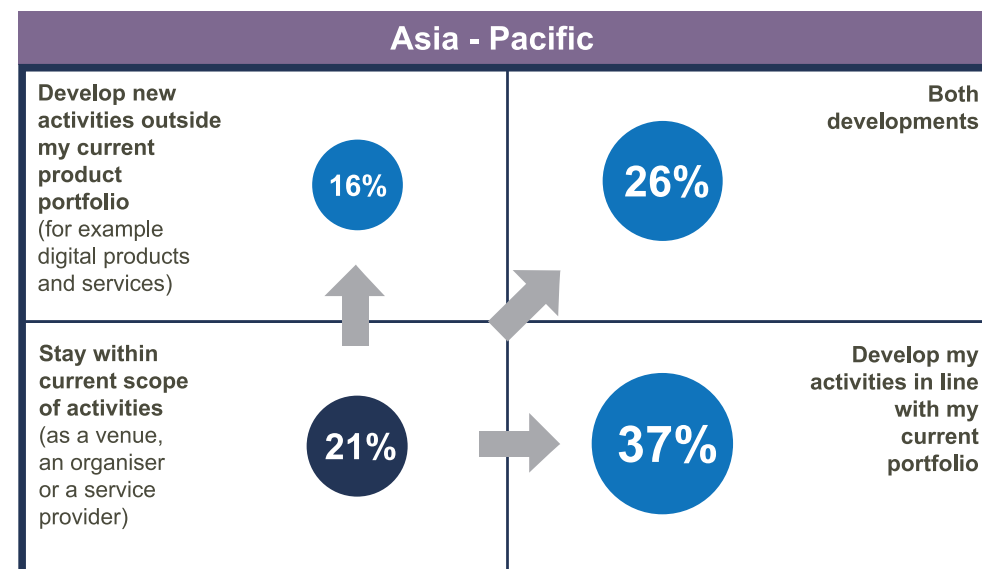
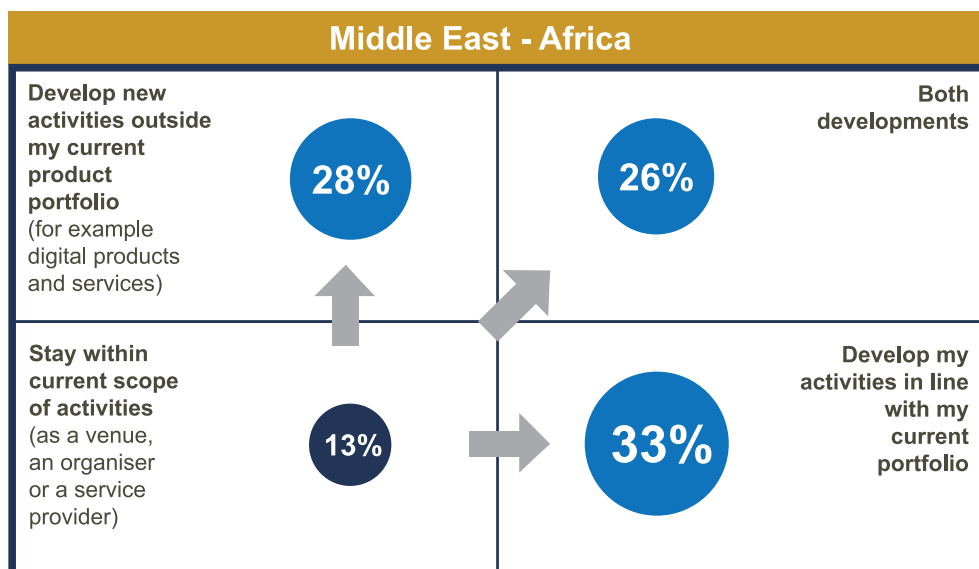
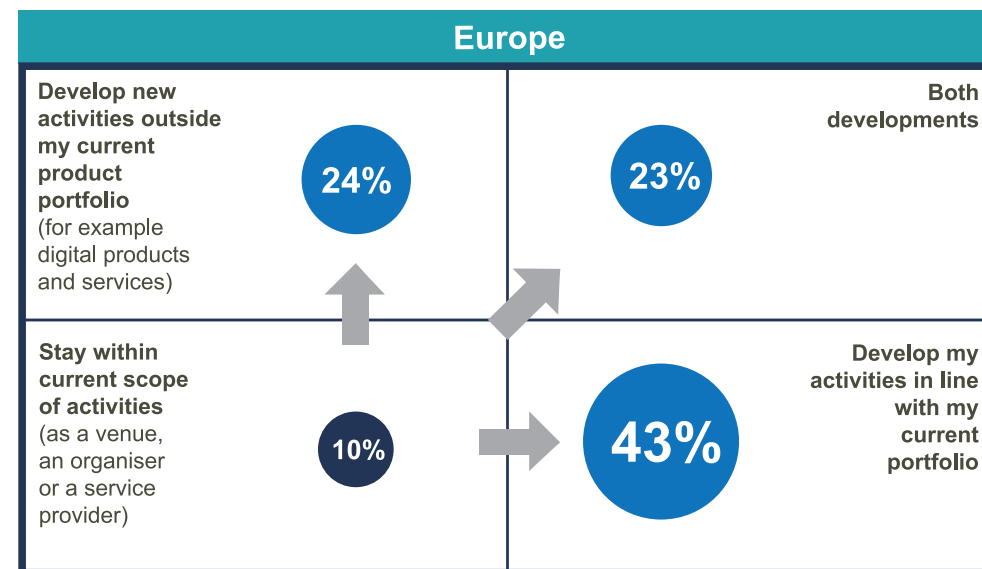
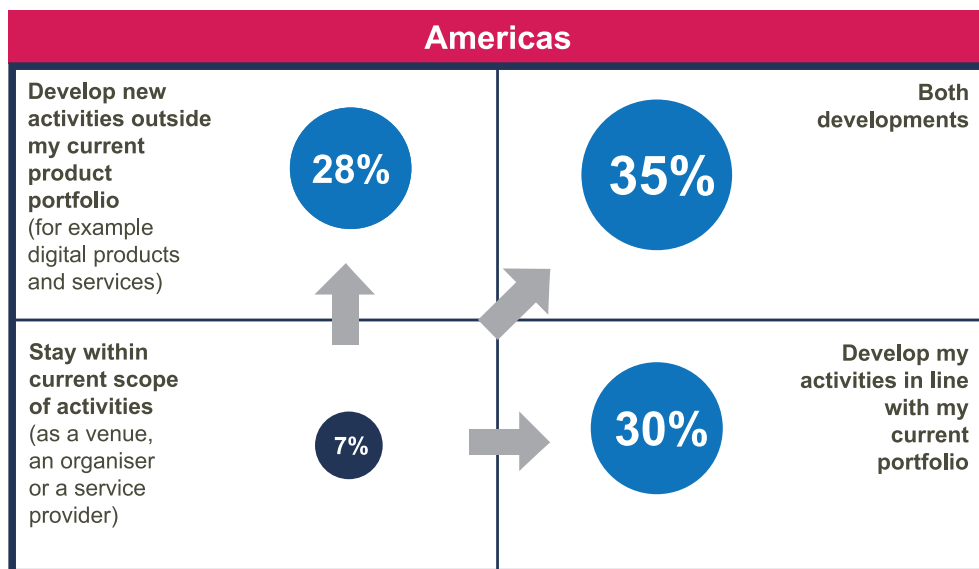
Companies were asked to share their current priorities in terms of strategy in two specific areas: their range of activities and their geographical exposure.

In all regions, a large majority of companies intend to develop new activities, in either the classic range of exhibition industry activities (venue/organiser/services), or outside of the current product portfolios, or in both: 79% in Asia/Pacific, 87% in the Middle East & Africa, 90% in Europe and 93% in the Americas.

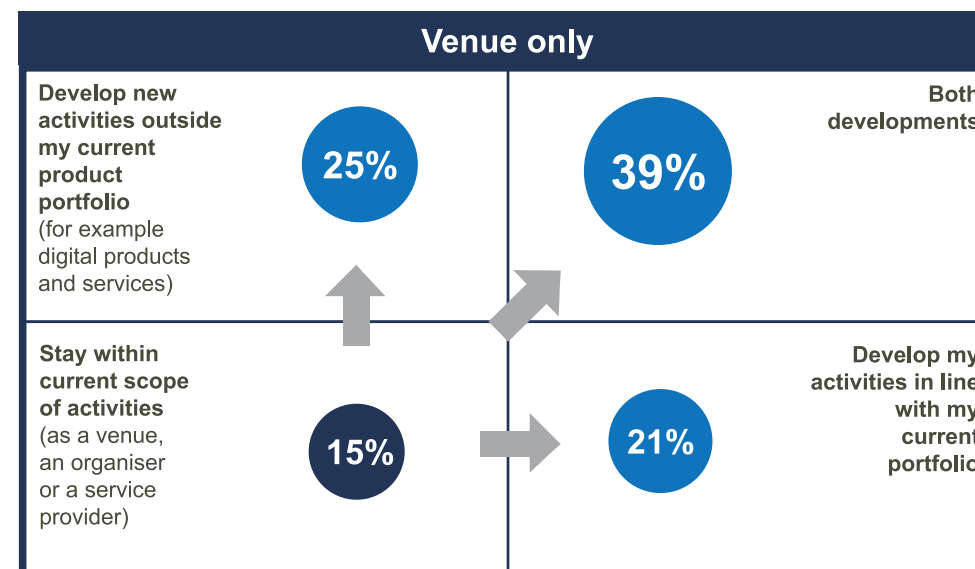
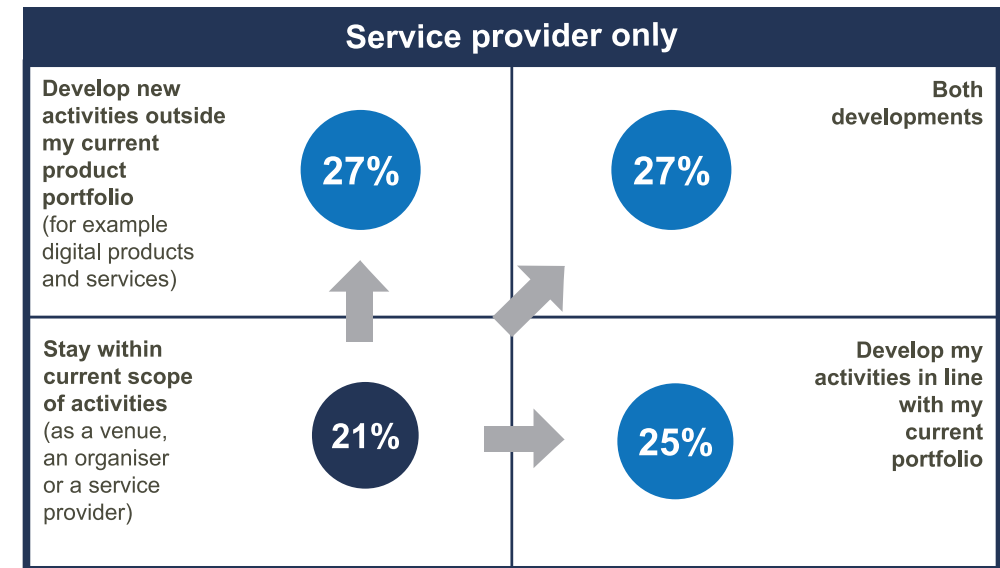
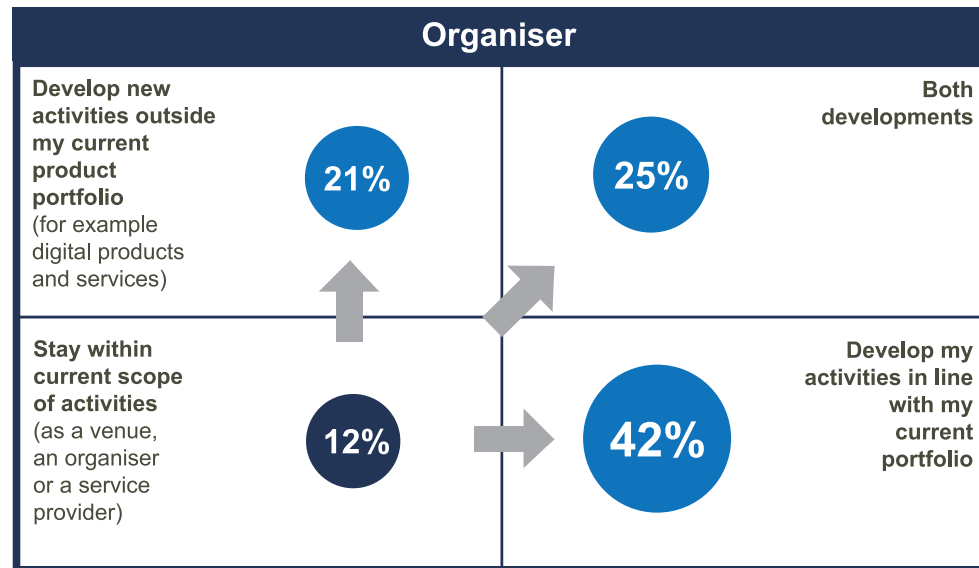
In terms of geographical expansion, 36% of companies on average declare an intention to develop operations in new countries, and this is the case for a majority of companies in 7 of the 22 markets analysed: Germany (73%), the UK (73%), South Africa (64%), “other countries of Middle East” (56%), Brazil (50%), Italy (50%) and USA (50%).

These results are also detailed in the following pages for the main segments of “company type” (“Organiser”, “Venue only” and “Service Provider only”).

Current strategic priorities related to the range of activities: by region



Current strategic priorities related to the range of activities: by type of activity

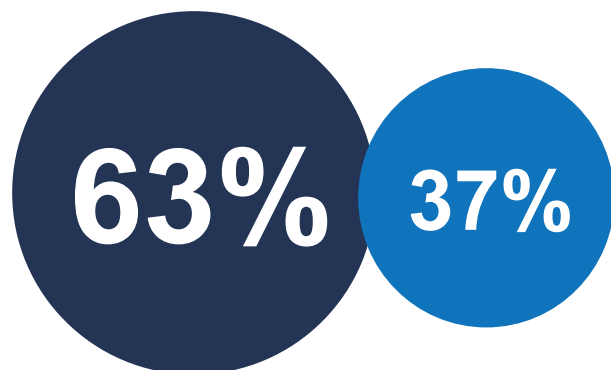


Current strategic priorities related to geographic exposure: by region

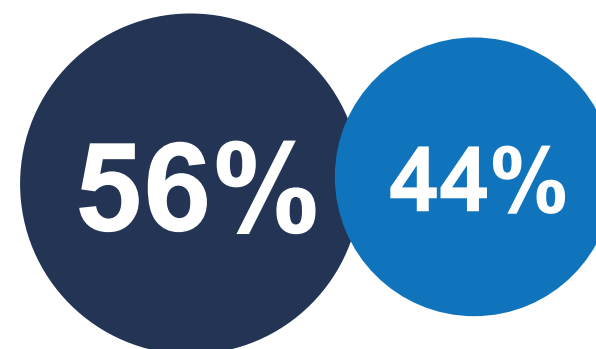
Stay in the same countries as those in which I currently operate

Operate in new countries

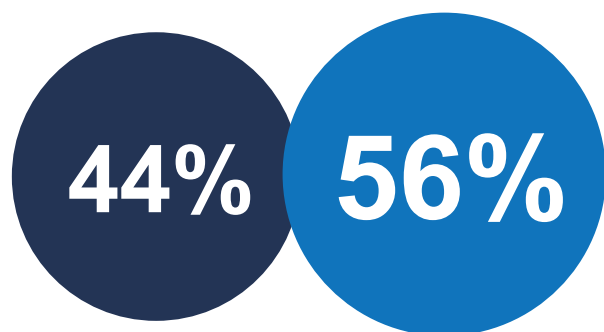
Americas



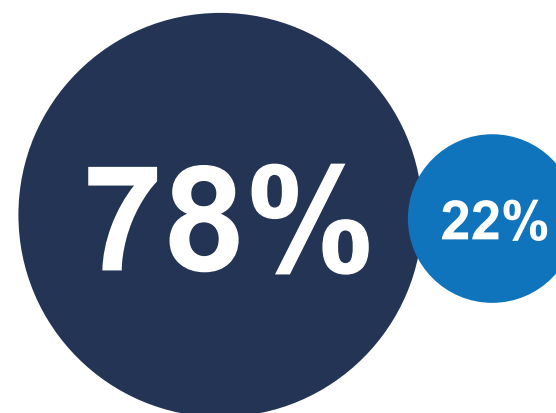
Europe



Middle East - Africa



Asia - Pacific



Current strategic priorities related to geographic exposure: by type of activity

Stay in the same countries as those in which I currently operate

Operate in new countries

Organiser

68%

32%

Service provider only

50%

50%

Venue only

87%

13%

Part 2: Detailed results for 22 selected countries or zones

North America:

Mexico
US

Central and South America:

Argentina
Brazil
Colombia
Other Countries in Central and South America

Europe:

Germany
Italy
Russia
United Kingdom
Other countries in Europe

Africa:

South Africa

Middle East:

UAE
Other Countries in the Middle East

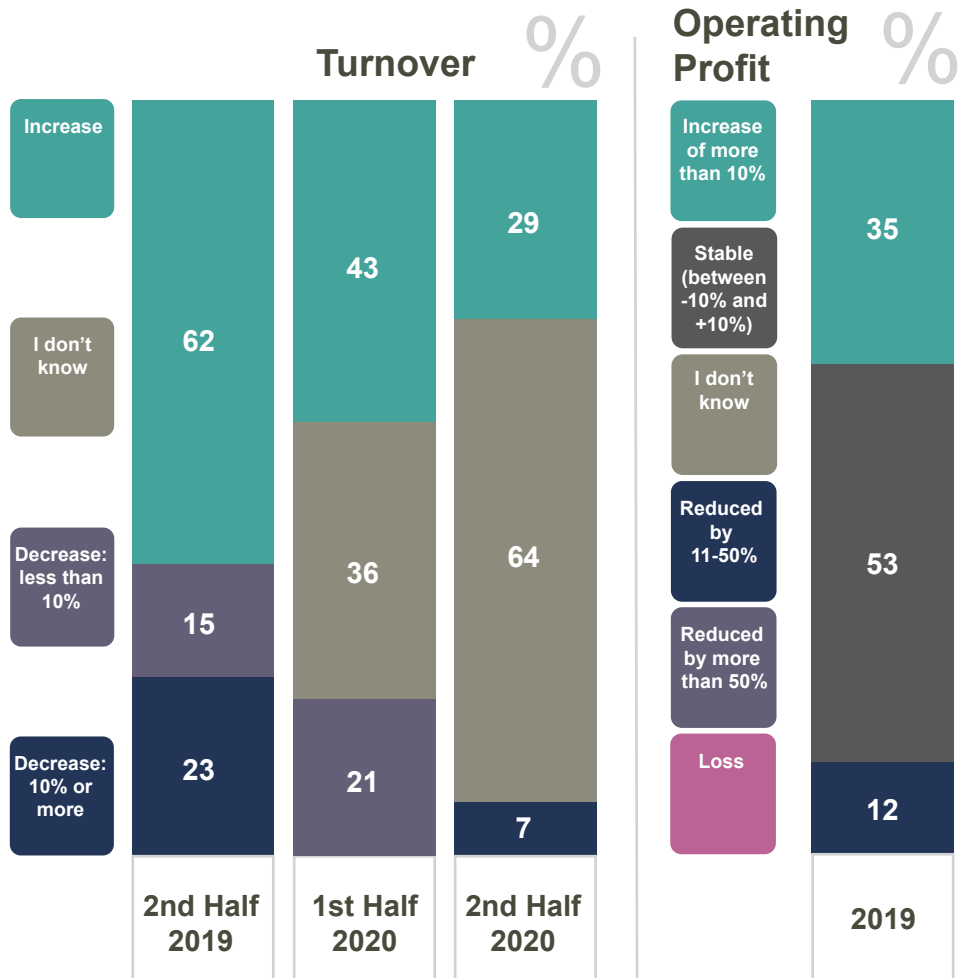
Asia - Pacific:

Australia
China
India
Indonesia
Japan
Macau
Thailand
Other countries in Asia - Pacific

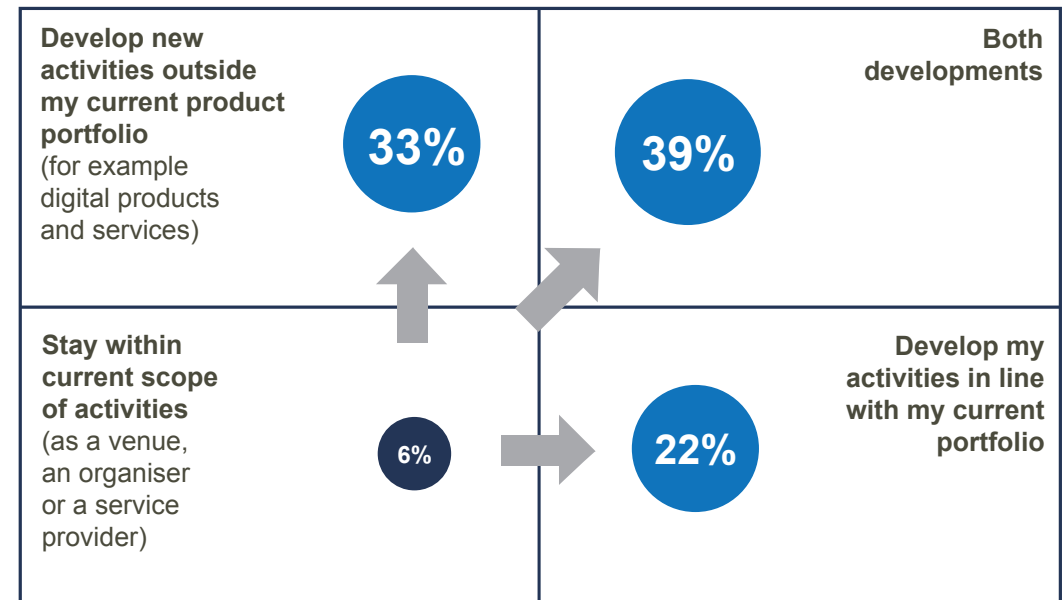
Detailed results for Mexico



Financial expectations of Mexican exhibition companies compared to previous years



Current strategic priorities related to the range of activities



Current strategic priorities related to geographic exposure



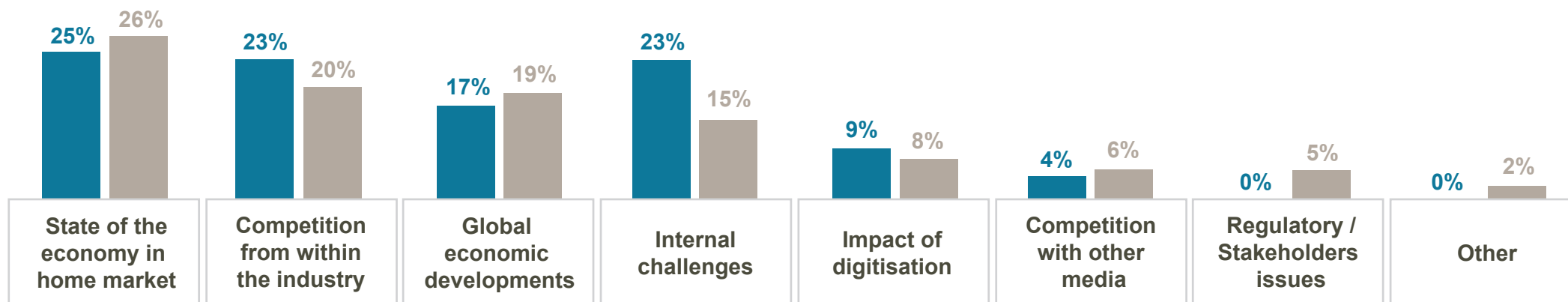
Detailed results for Mexico



Most important business issues in the exhibition industry in Mexico and globally

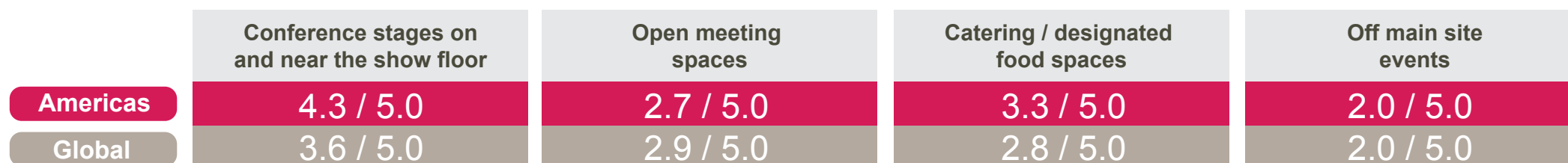
Mexico

Global

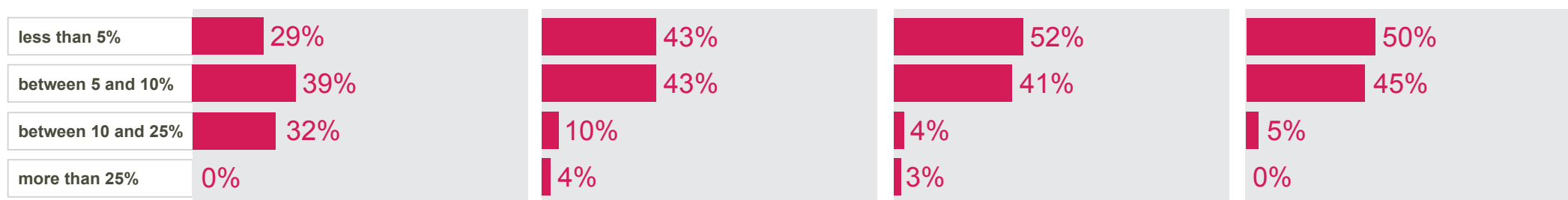


Evolution of the business model for exhibitions

To what degree have you added the following elements to your shows?



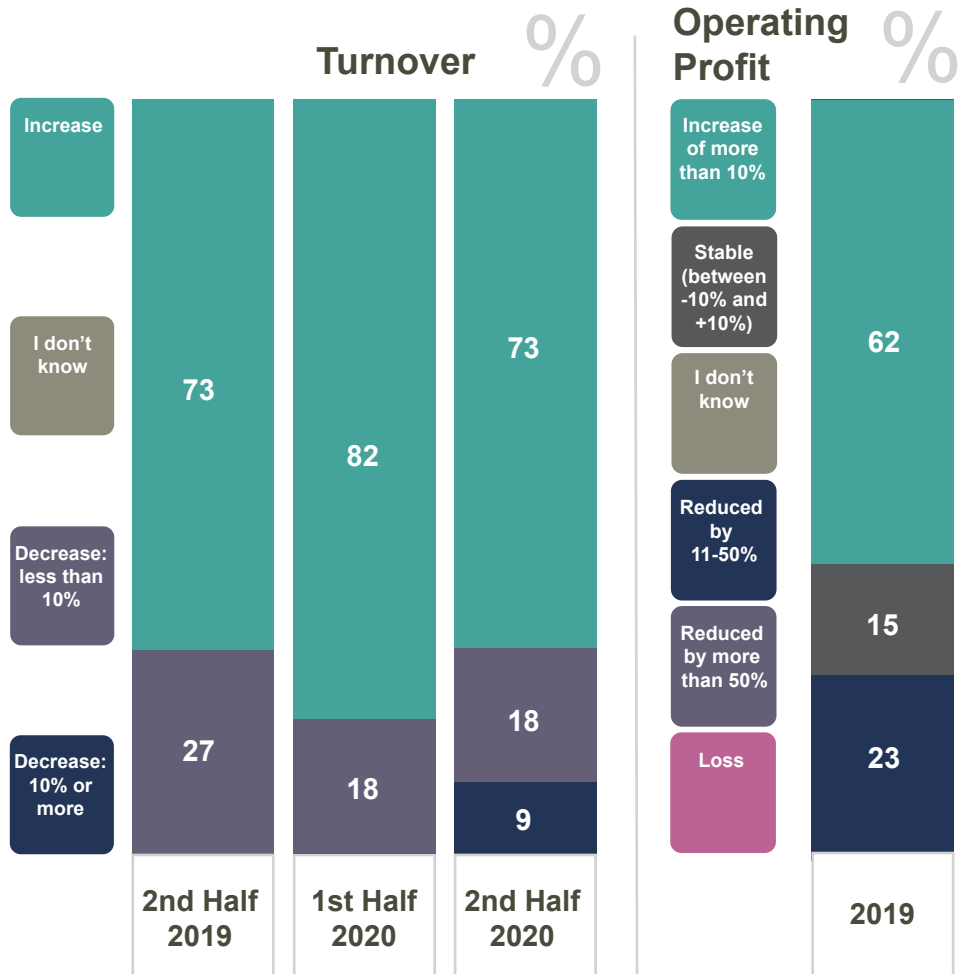
What share of your total space available is used for the respective purposes during your exhibitions?



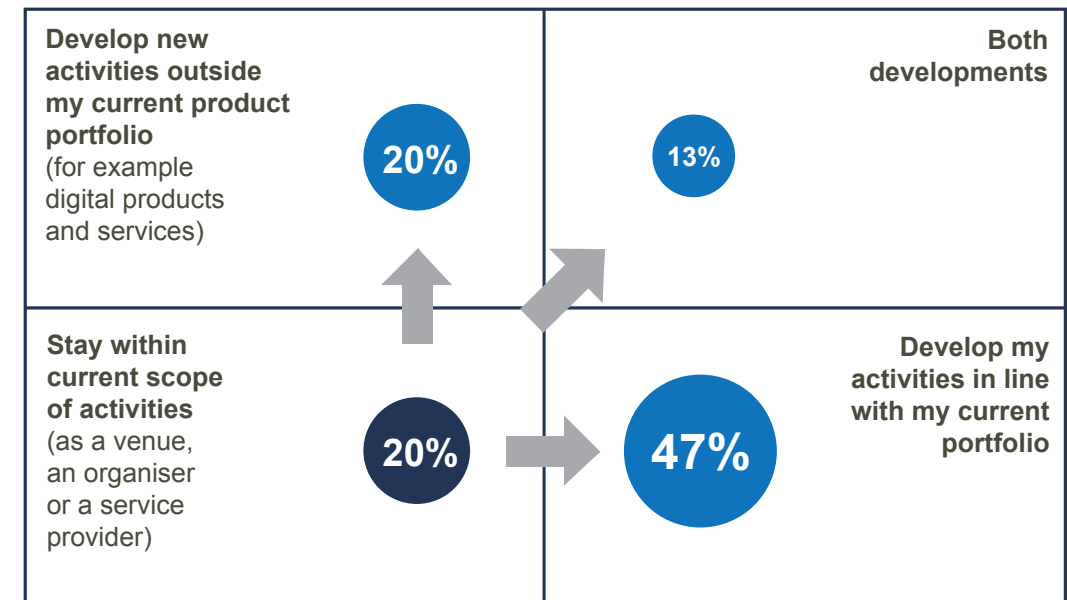
Detailed results for US



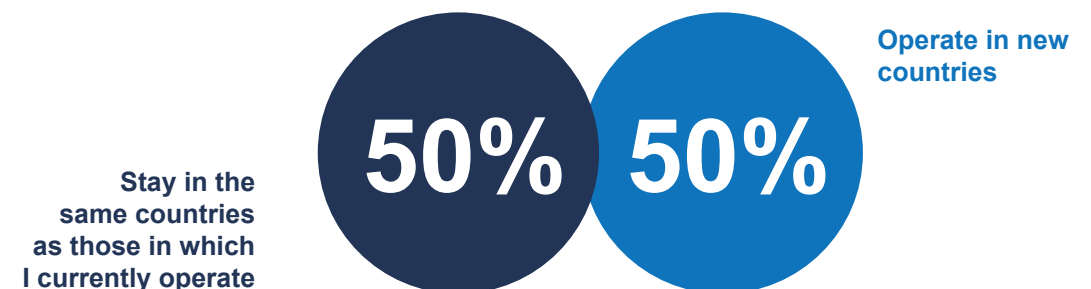
Financial expectations of US exhibition companies compared to previous years



Current strategic priorities related to the range of activities



Current strategic priorities related to geographic exposure



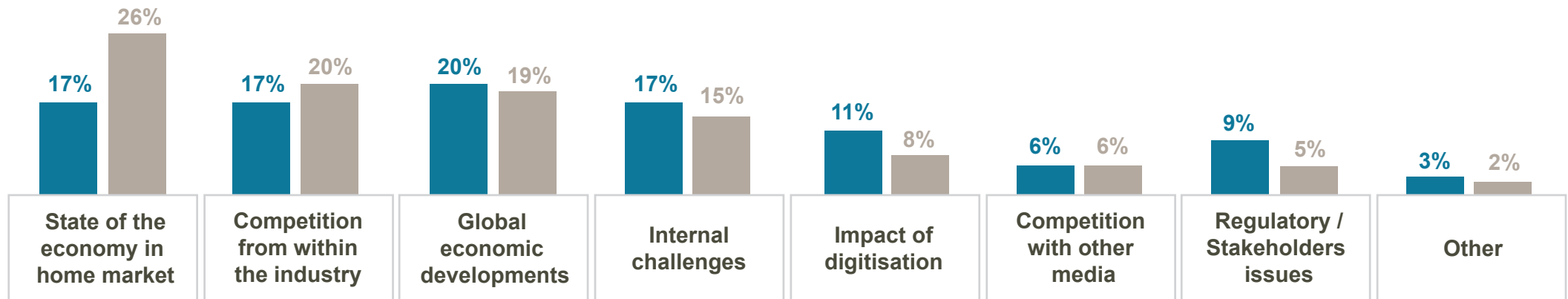
Detailed results for US



Most important business issues in the exhibition industry in the US and globally

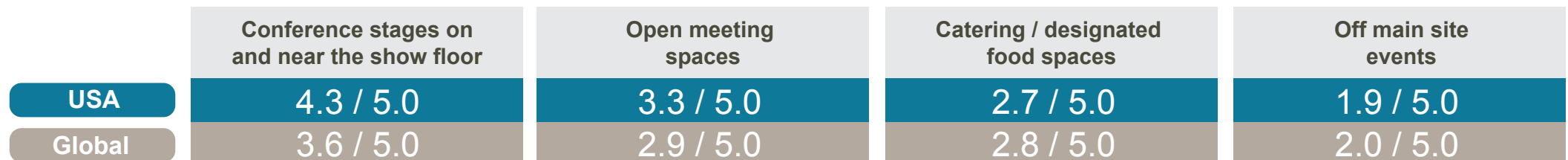
USA

Global

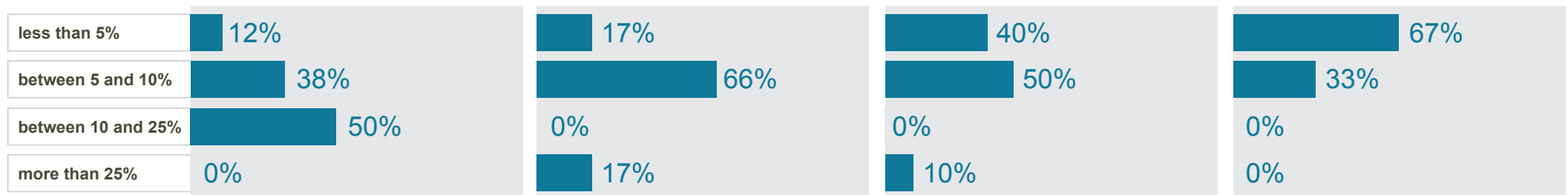


Evolution of the business model for exhibitions

To what degree have you added the following elements to your shows?



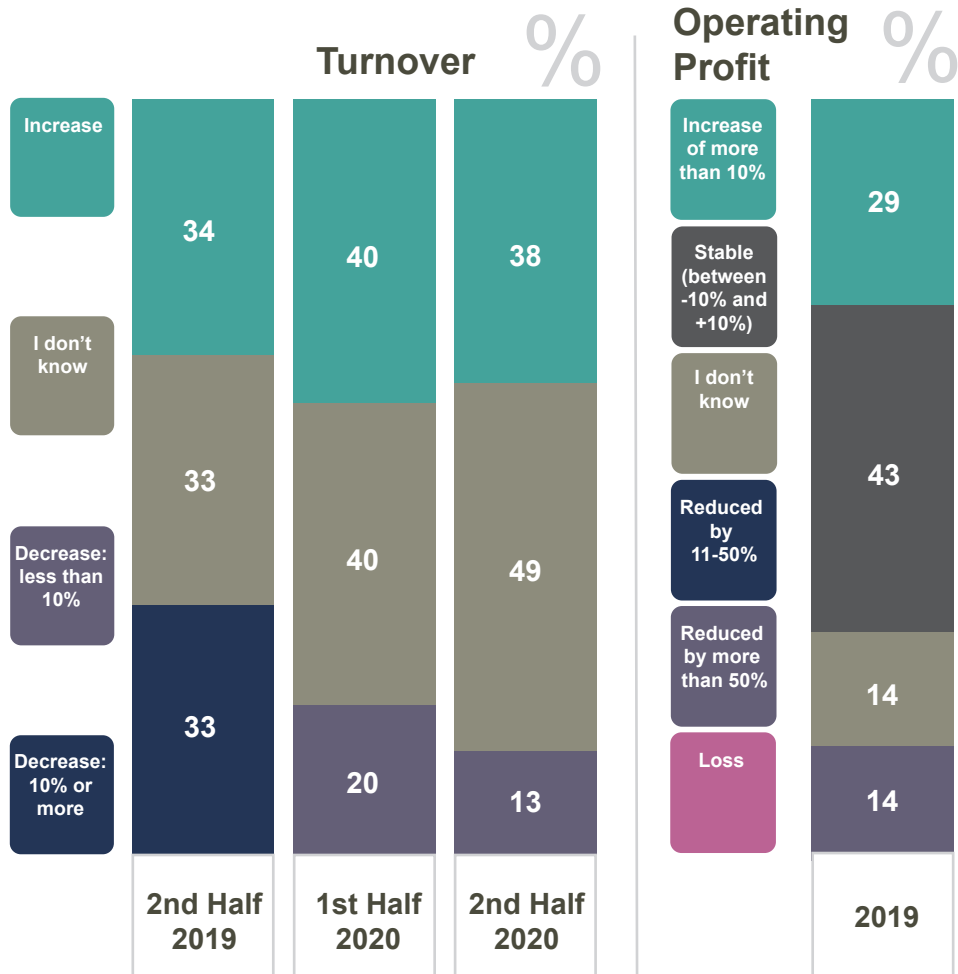
What share of your total space available is used for the respective purposes during your exhibitions?



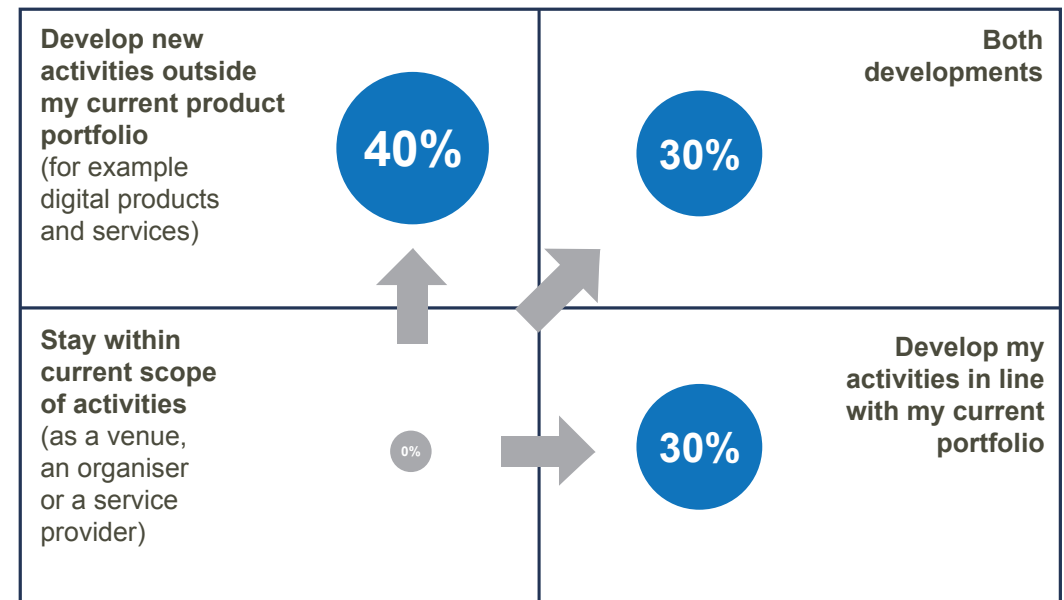
Detailed results for Argentina



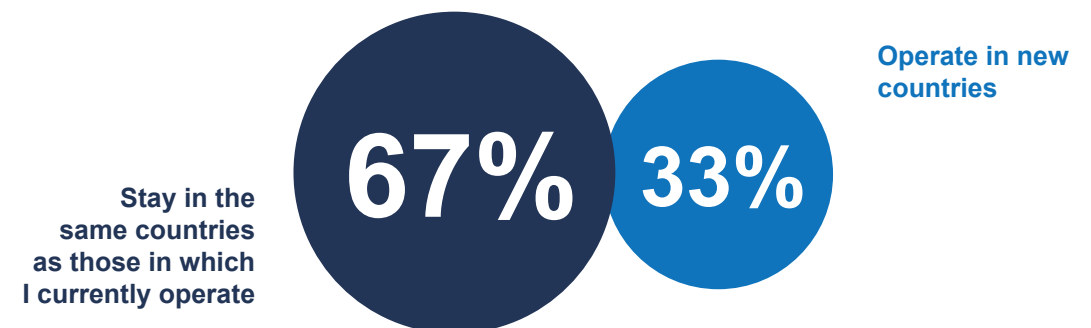
Financial expectations of Argentinian exhibition companies compared to previous years



Current strategic priorities related to the range of activities



Current strategic priorities related to geographic exposure



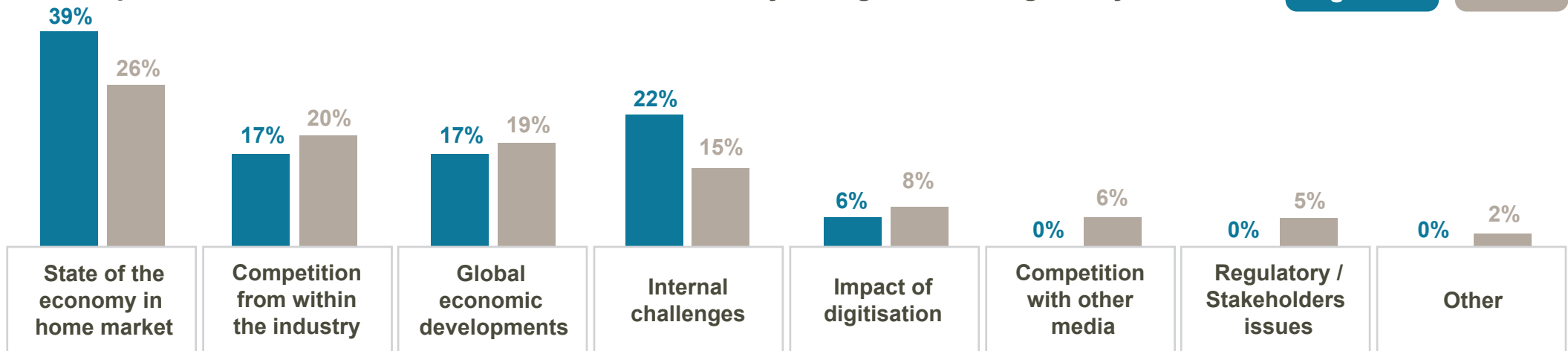
Detailed results for Argentina



Most important business issues in the exhibition industry in Argentina and globally

Argentina

Global



Evolution of the business model for exhibitions

To what degree have you added the following elements to your shows?

	Conference stages on and near the show floor	Open meeting spaces	Catering / designated food spaces	Off main site events
Americas	4.3 / 5.0	2.7 / 5.0	3.3 / 5.0	2.0 / 5.0
Global	3.6 / 5.0	2.9 / 5.0	2.8 / 5.0	2.0 / 5.0

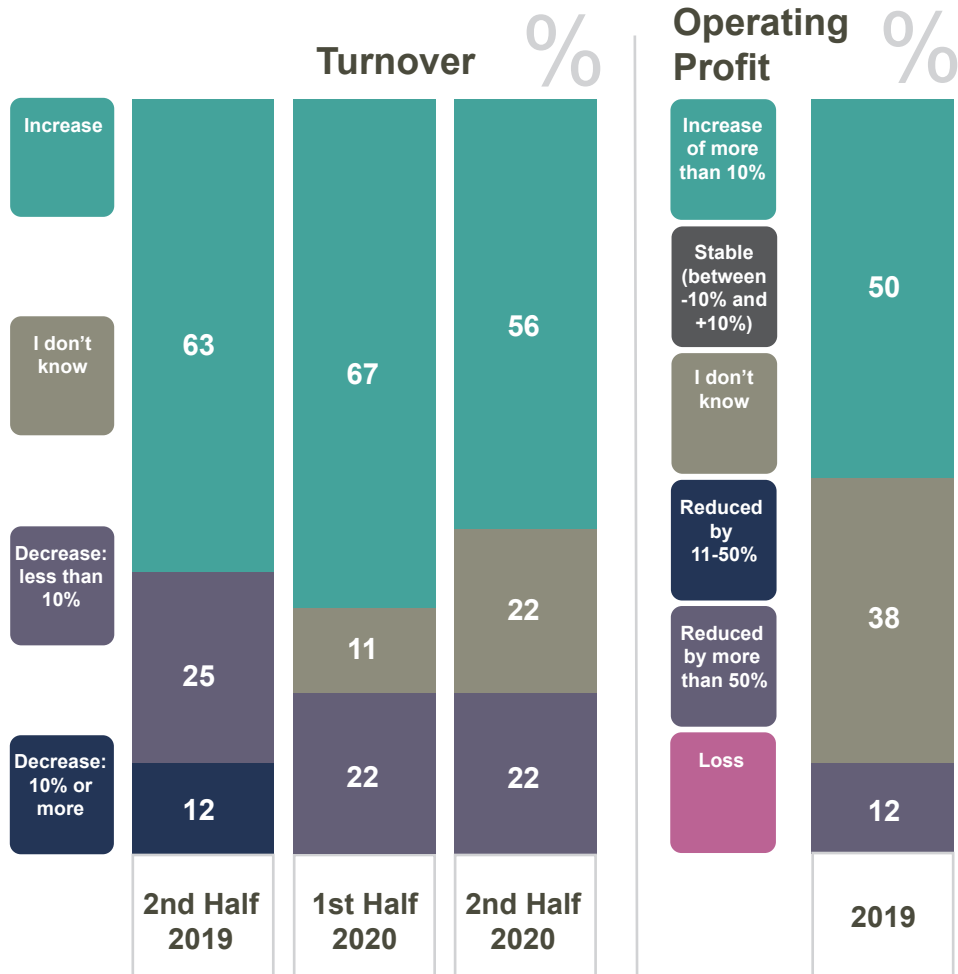
What share of your total space available is used for the respective purposes during your exhibitions?

	Conference stages on and near the show floor	Open meeting spaces	Catering / designated food spaces	Off main site events
less than 5%	29%	43%	52%	50%
between 5 and 10%	39%	43%	41%	45%
between 10 and 25%	32%	10%	4%	5%
more than 25%	0%	4%	3%	0%

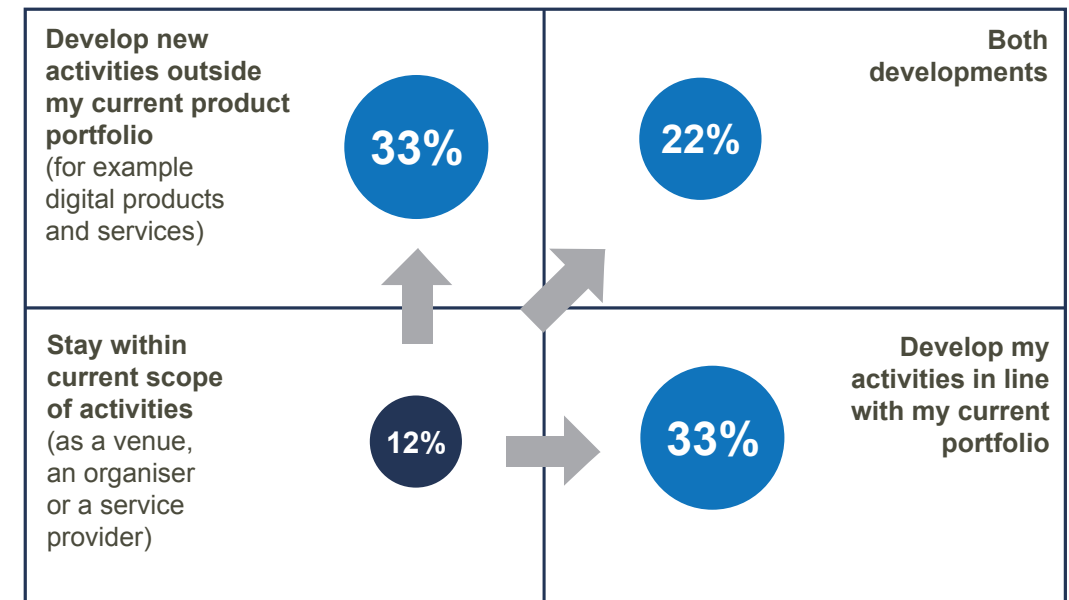
Detailed results for Brazil



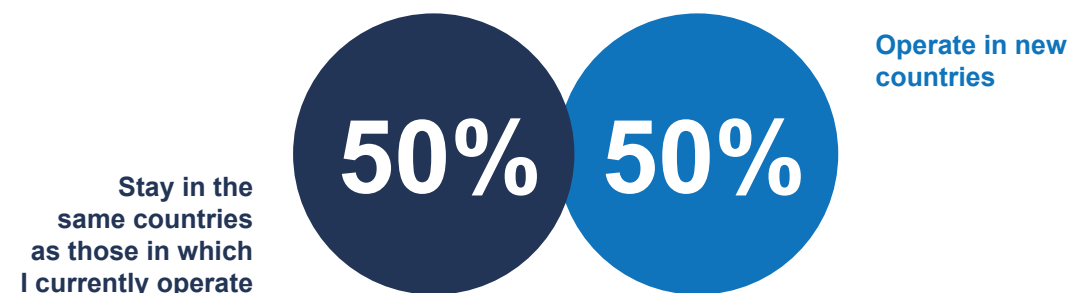
Financial expectations of Brazilian exhibition companies compared to previous years



Current strategic priorities related to the range of activities



Current strategic priorities related to geographic exposure



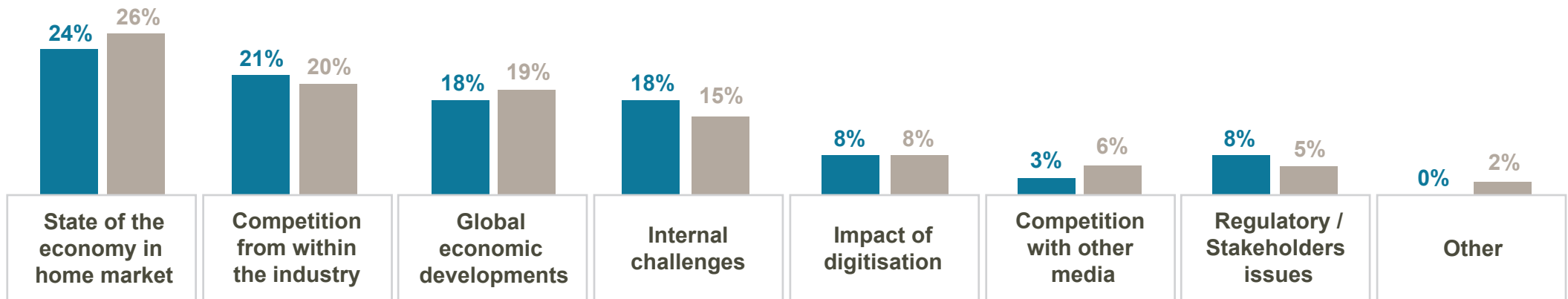
Detailed results for Brazil



Most important business issues in the exhibition industry in Brazil and globally

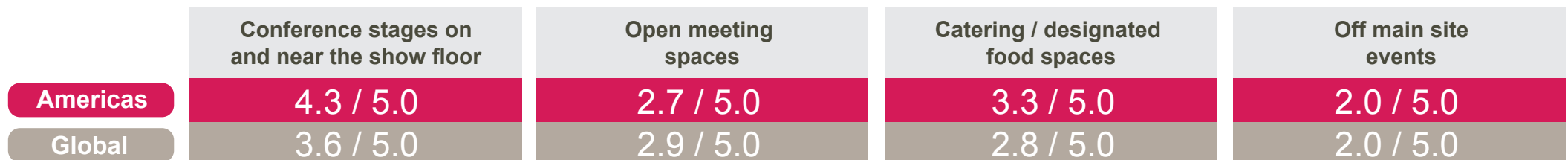
Brazil

Global



Evolution of the business model for exhibitions

To what degree have you added the following elements to your shows?



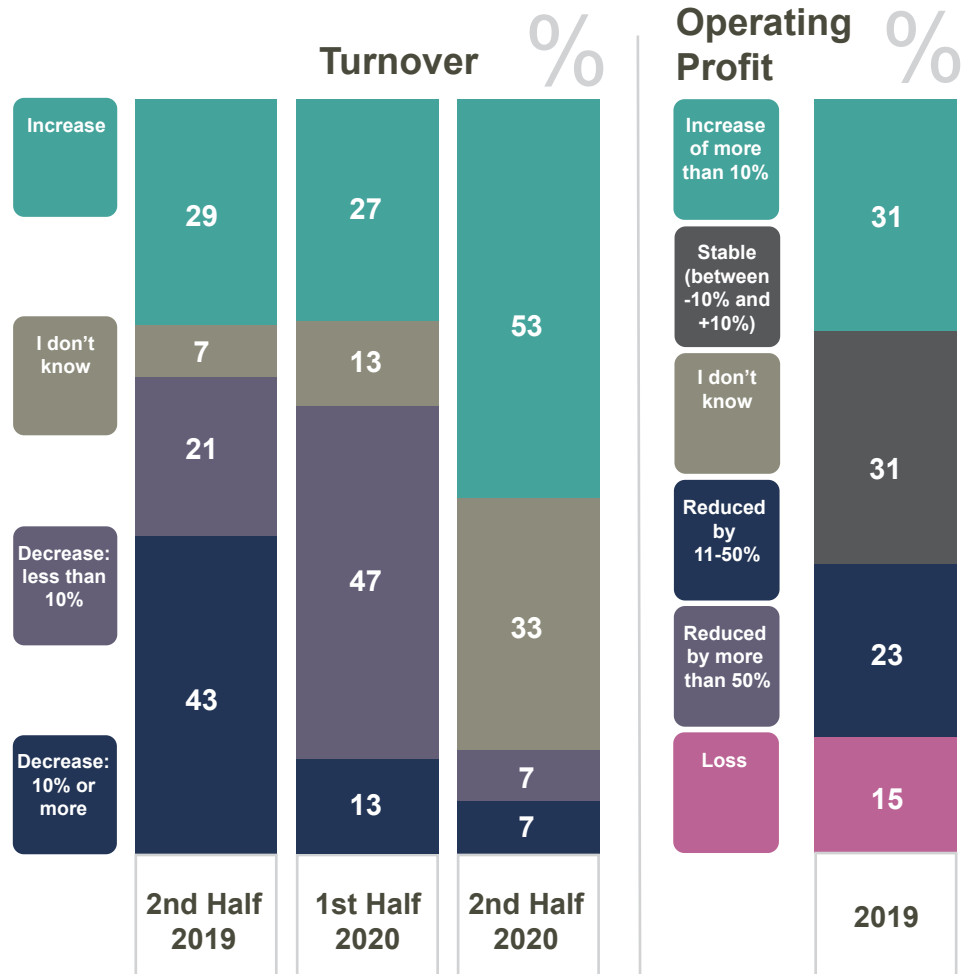
What share of your total space available is used for the respective purposes during your exhibitions?



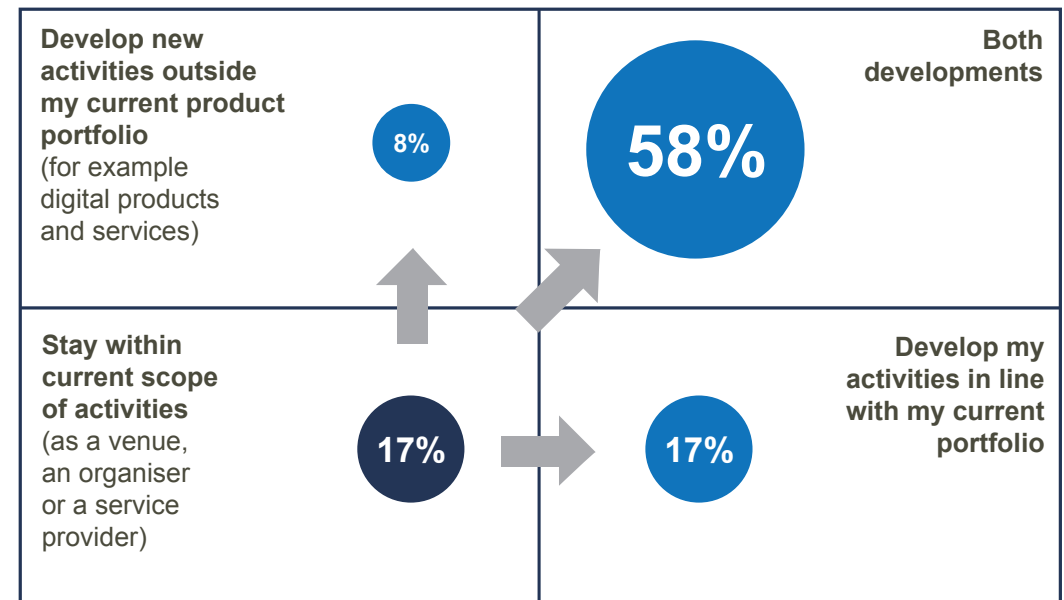
Detailed results for Colombia



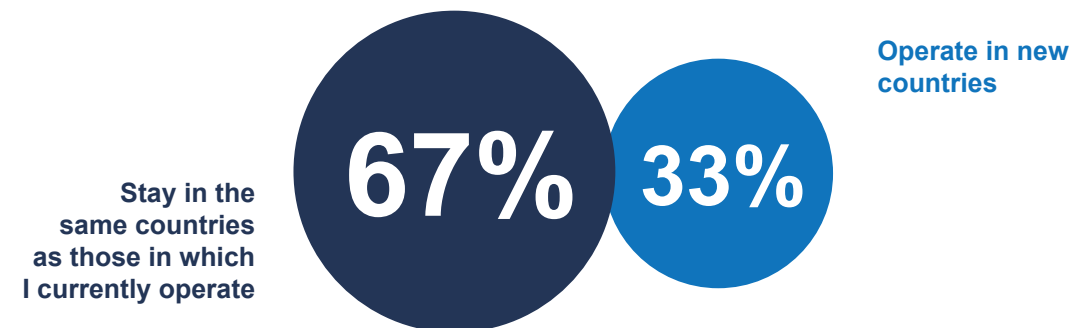
Financial expectations of Colombian exhibition companies compared to previous years



Current strategic priorities related to the range of activities



Current strategic priorities related to geographic exposure



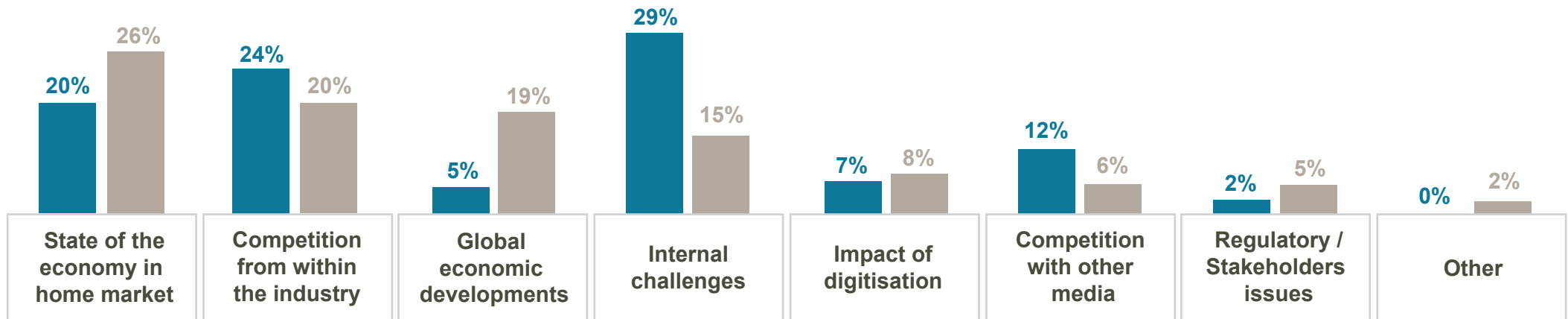
Detailed results for Colombia



Most important business issues in the exhibition industry in Colombia and globally

Colombia

Global



Evolution of the business model for exhibitions

To what degree have you added the following elements to your shows?

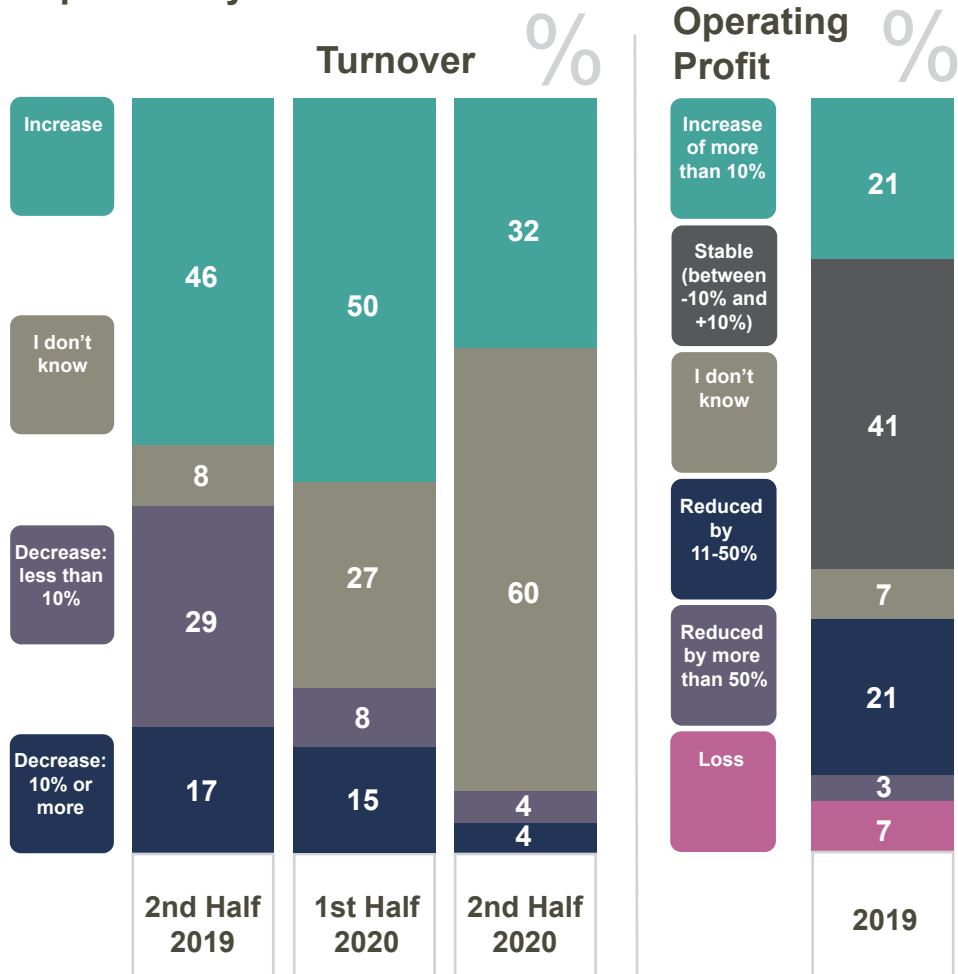
	Conference stages on and near the show floor	Open meeting spaces	Catering / designated food spaces	Off main site events
Americas	4.3 / 5.0	2.7 / 5.0	3.3 / 5.0	2.0 / 5.0
Global	3.6 / 5.0	2.9 / 5.0	2.8 / 5.0	2.0 / 5.0

What share of your total space available is used for the respective purposes during your exhibitions?

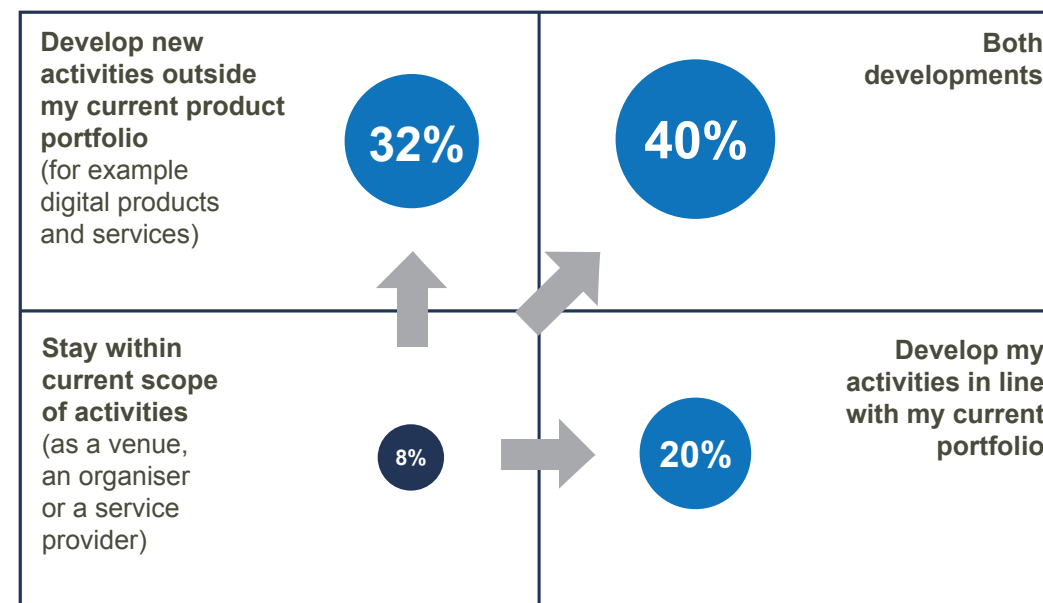


Detailed results for other countries in Central and South America

Financial expectations of Other Countries in Central and South America exhibition companies compared to previous years



Current strategic priorities related to the range of activities



Current strategic priorities related to geographic exposure

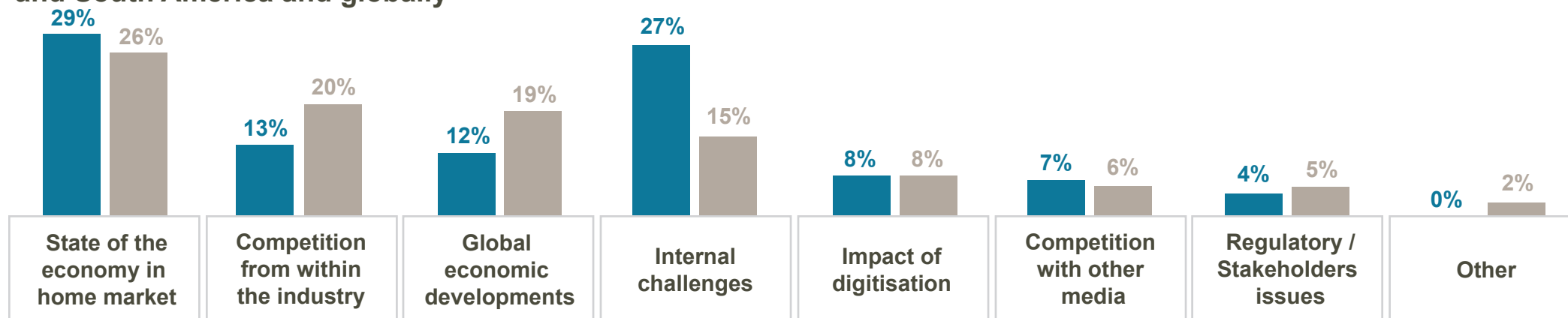


Detailed results for other countries in Central and South America

Most important business issues in the exhibition industry in Other Countries in Central and South America and globally

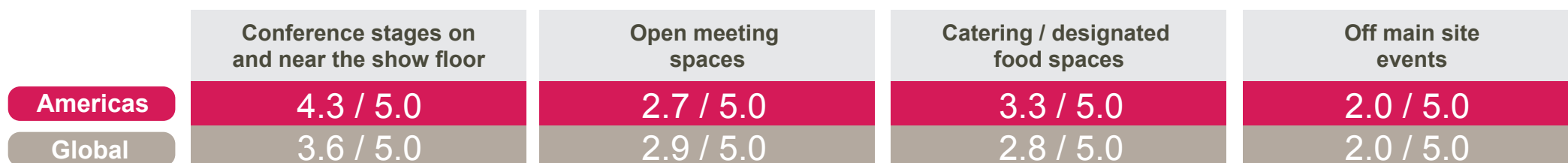
Others in CSA

Global

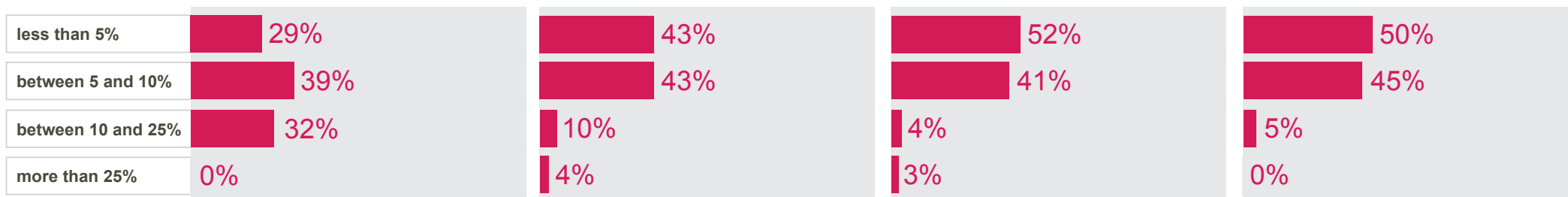


Evolution of the business model for exhibitions

To what degree have you added the following elements to your shows?



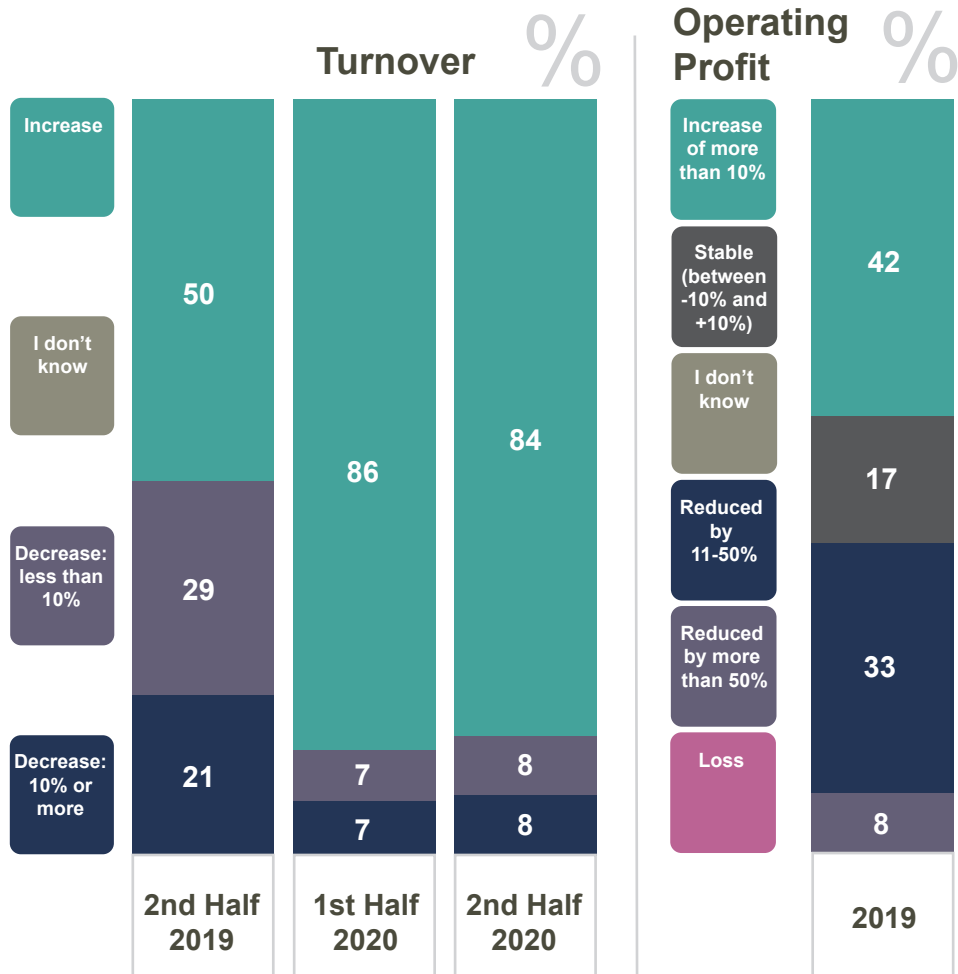
What share of your total space available is used for the respective purposes during your exhibitions?



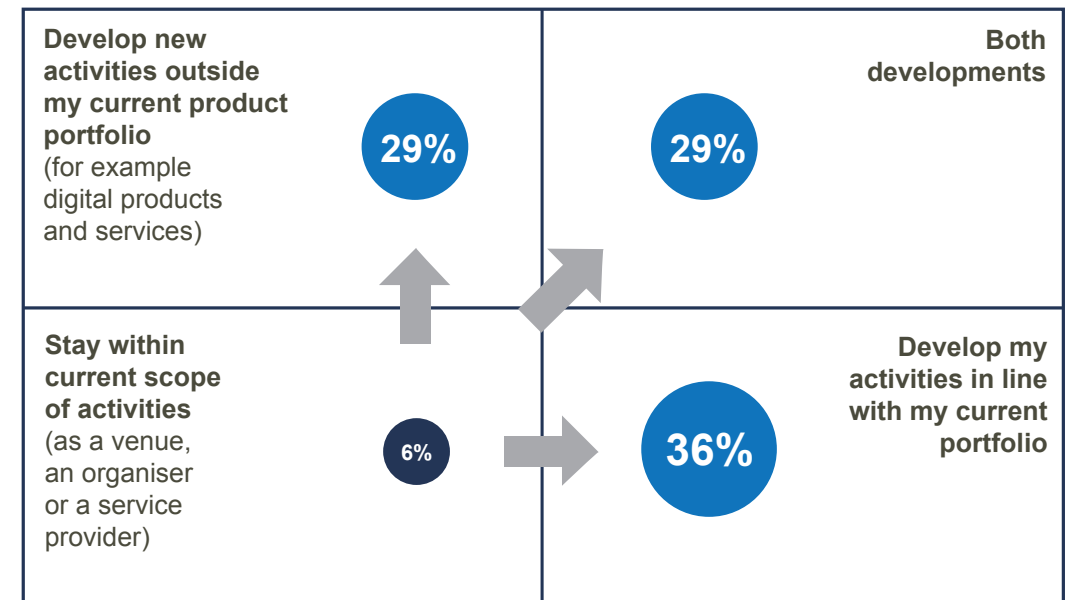
Detailed results for Germany



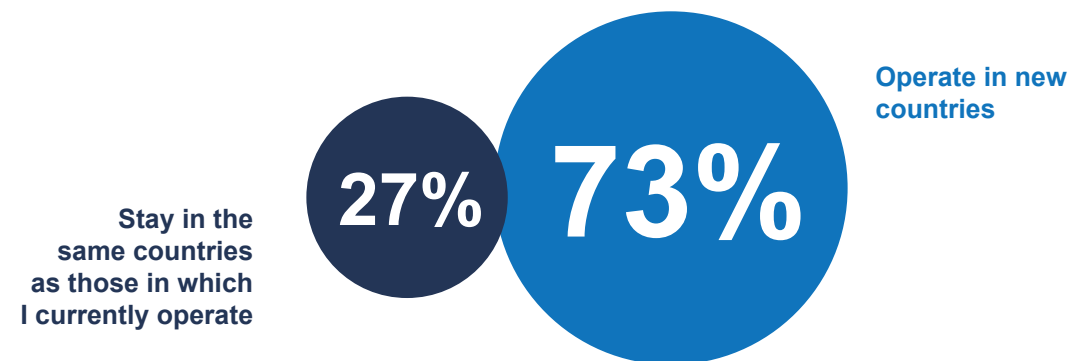
Financial expectations of German exhibition companies compared to previous years



Current strategic priorities related to the range of activities



Current strategic priorities related to geographic exposure



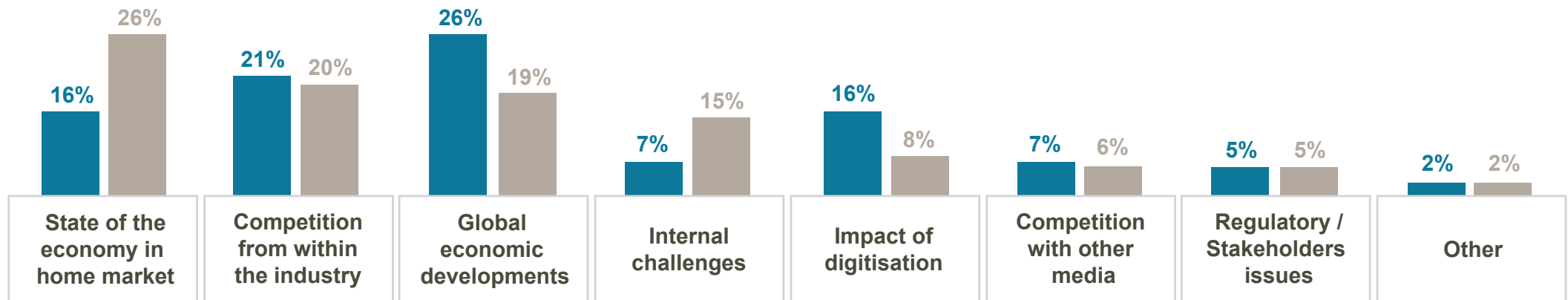
Detailed results for Germany



Most important business issues in the exhibition industry in Germany and globally

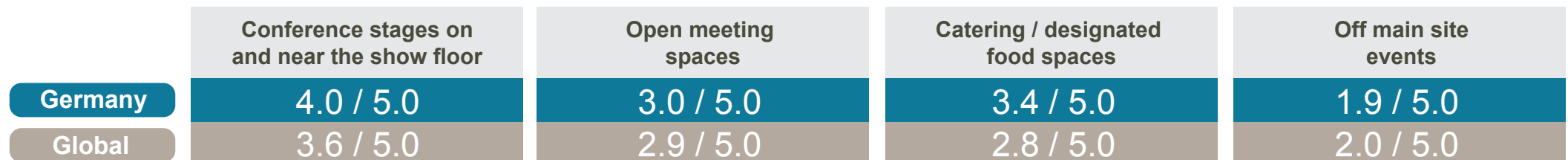
Germany

Global

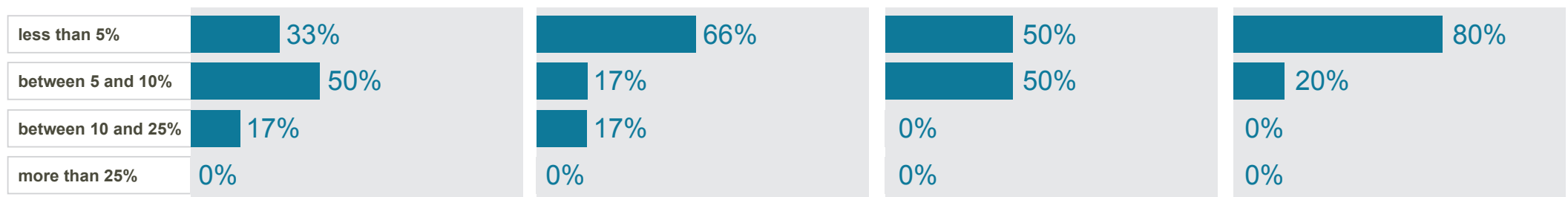


Evolution of the business model for exhibitions

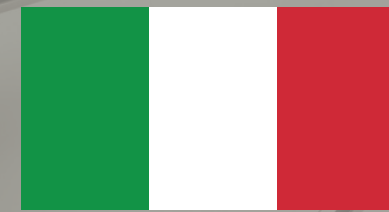
To what degree have you added the following elements to your shows?



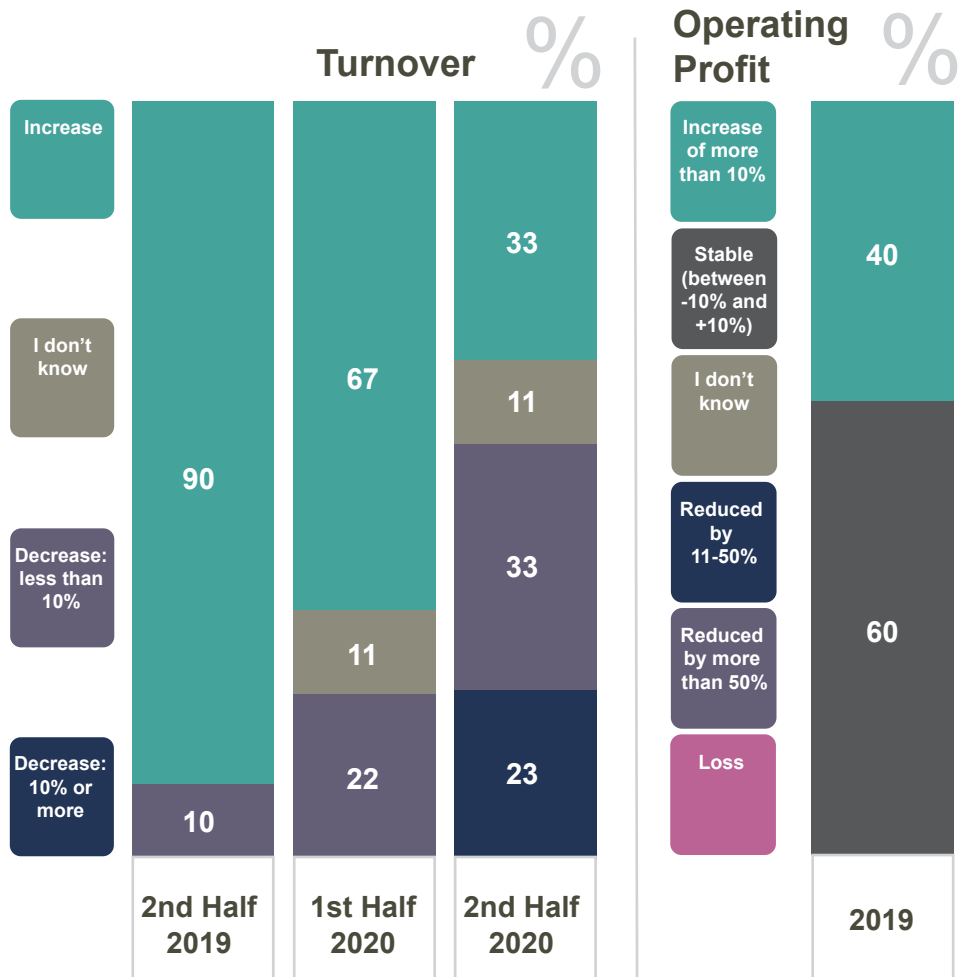
What share of your total space available is used for the respective purposes during your exhibitions?



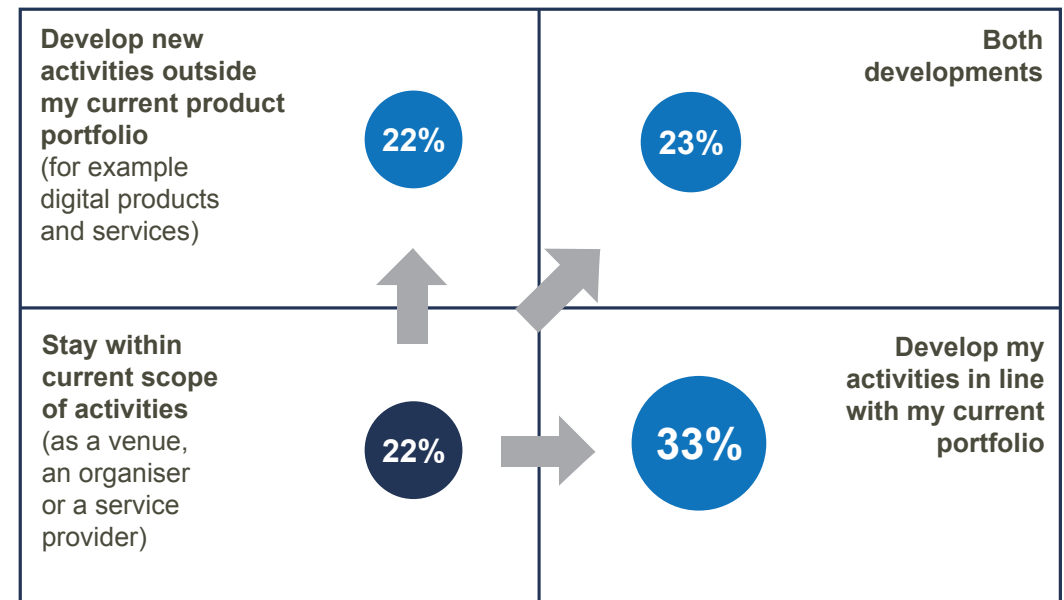
Detailed results for Italy



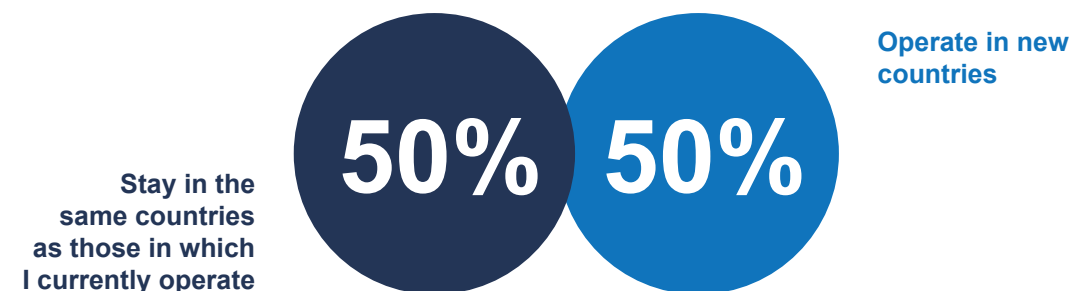
Financial expectations of Italian exhibition companies compared to previous years



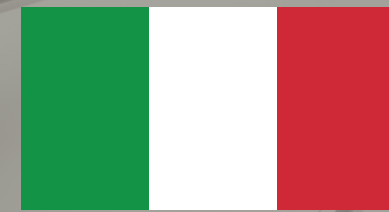
Current strategic priorities related to the range of activities



Current strategic priorities related to geographic exposure



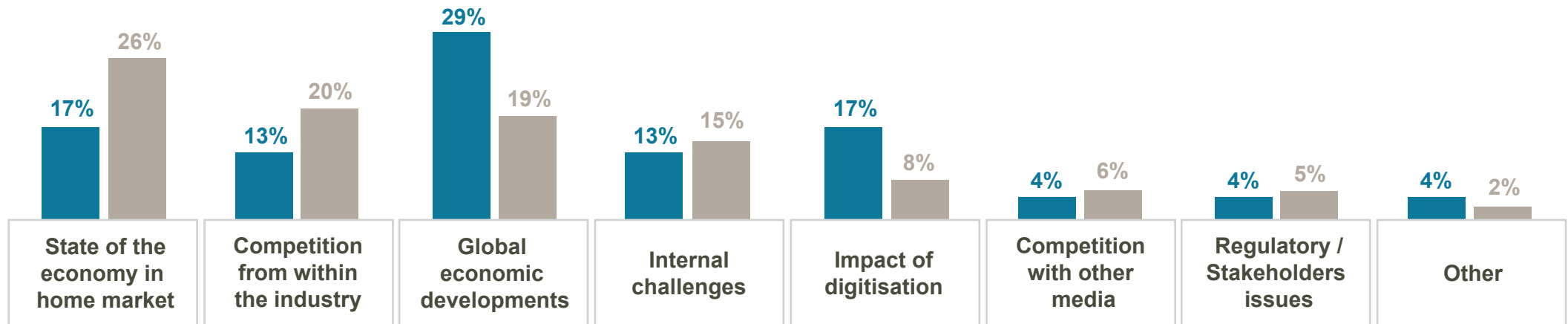
Detailed results for Italy



Most important business issues in the exhibition industry in Italy and globally

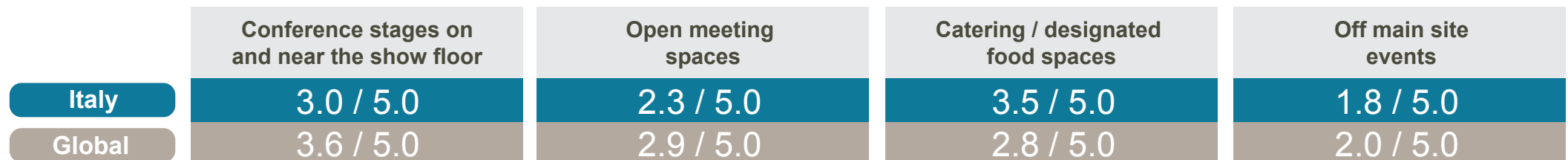
Italy

Global

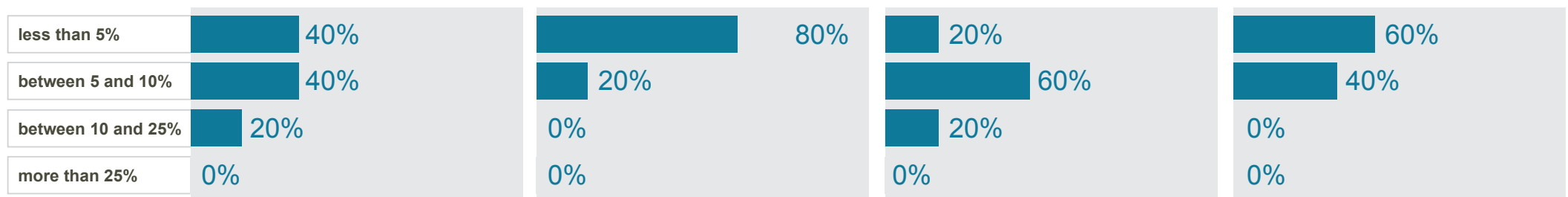


Evolution of the business model for exhibitions

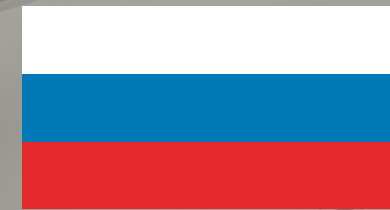
To what degree have you added the following elements to your shows?



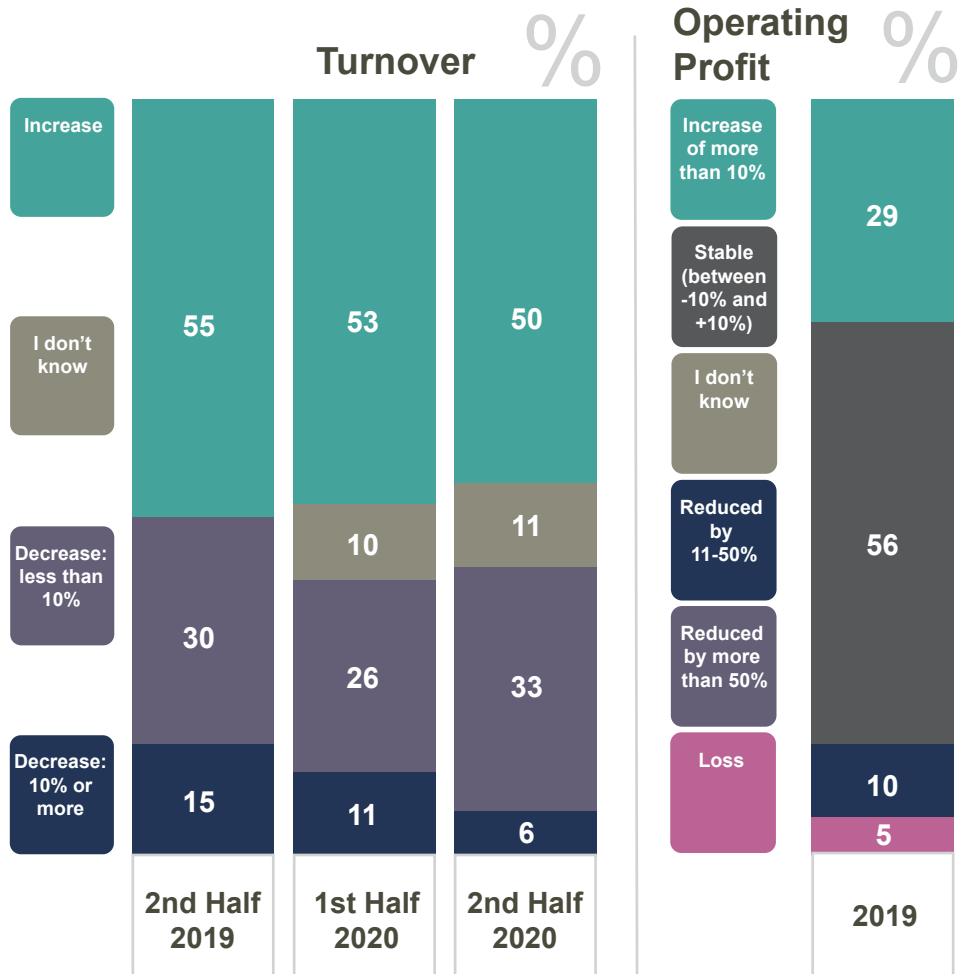
What share of your total space available is used for the respective purposes during your exhibitions?



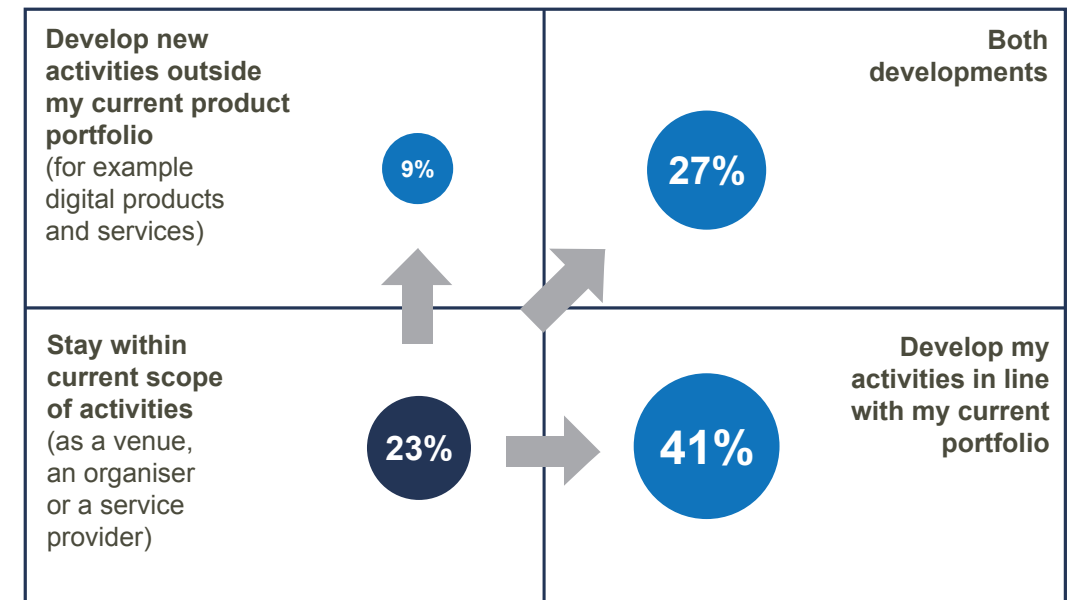
Detailed results for Russia



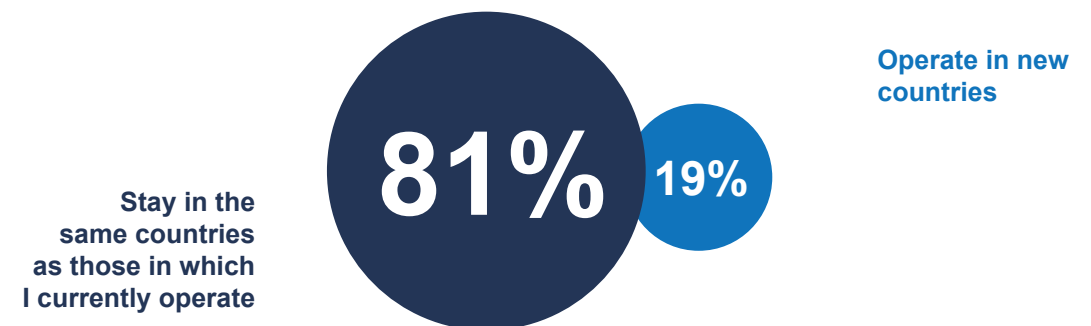
Financial expectations of Russian exhibition companies compared to previous years



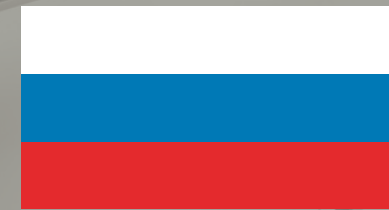
Current strategic priorities related to the range of activities



Current strategic priorities related to geographic exposure



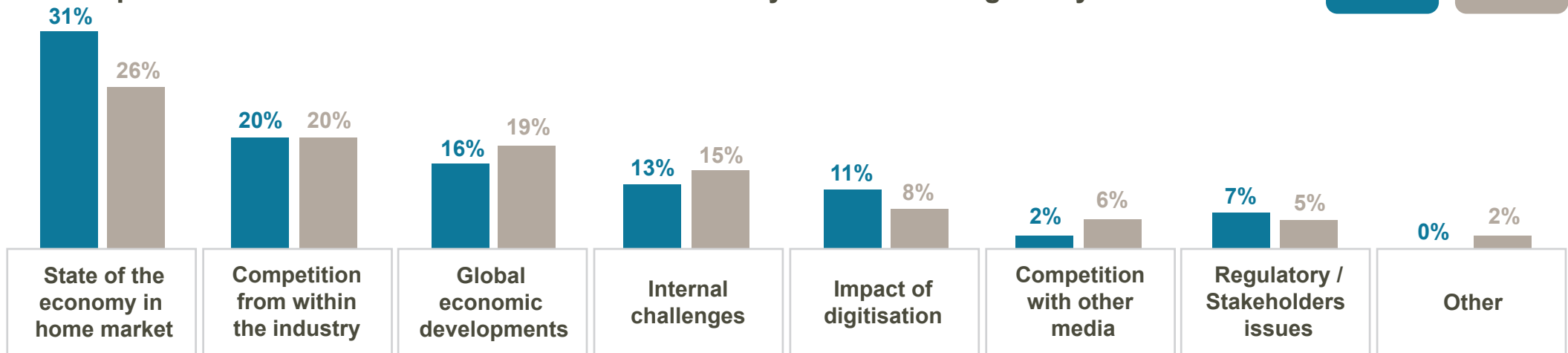
Detailed results for Russia



Most important business issues in the exhibition industry in Russia and globally

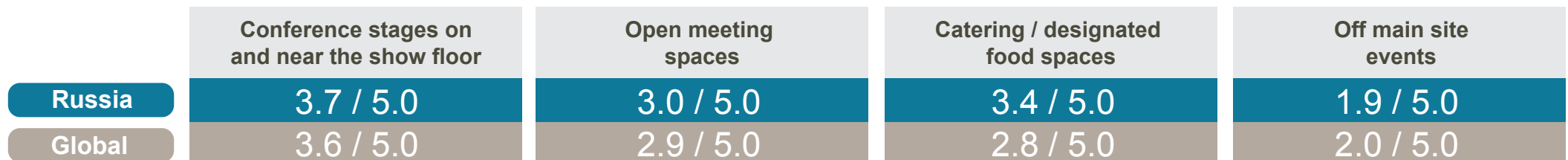
Russia

Global



Evolution of the business model for exhibitions

To what degree have you added the following elements to your shows?



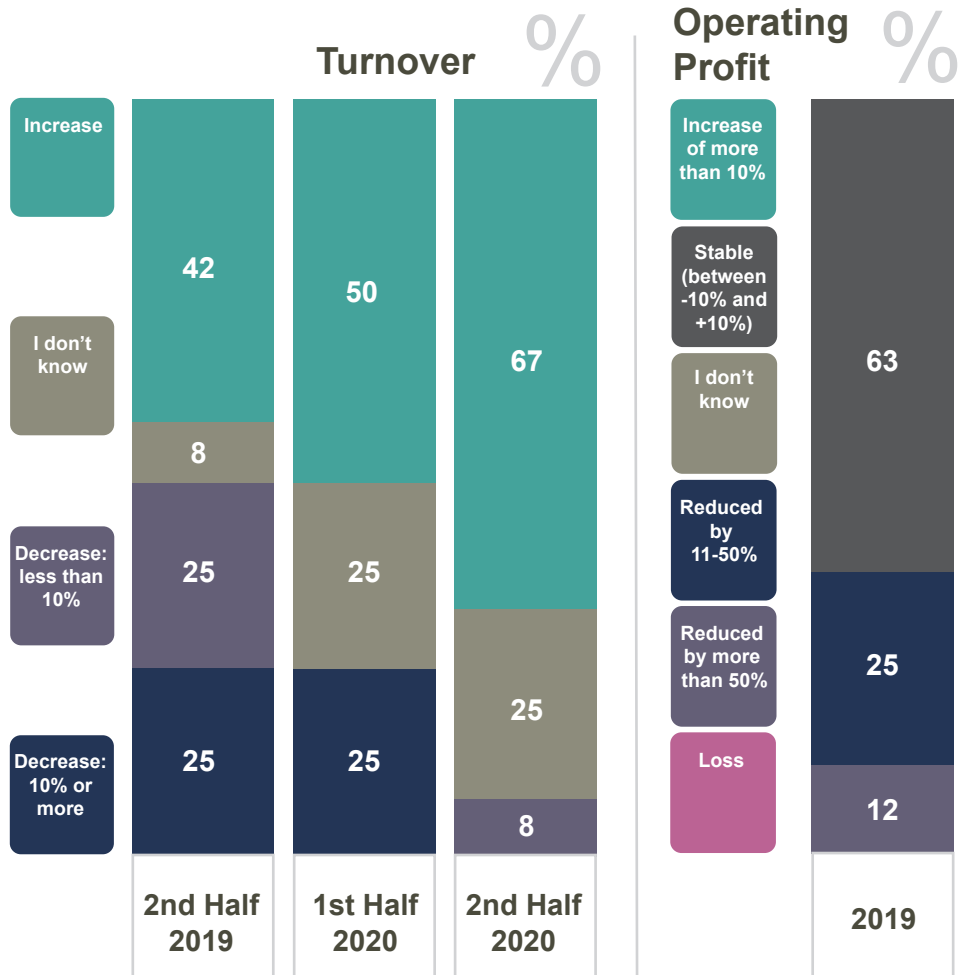
What share of your total space available is used for the respective purposes during your exhibitions?



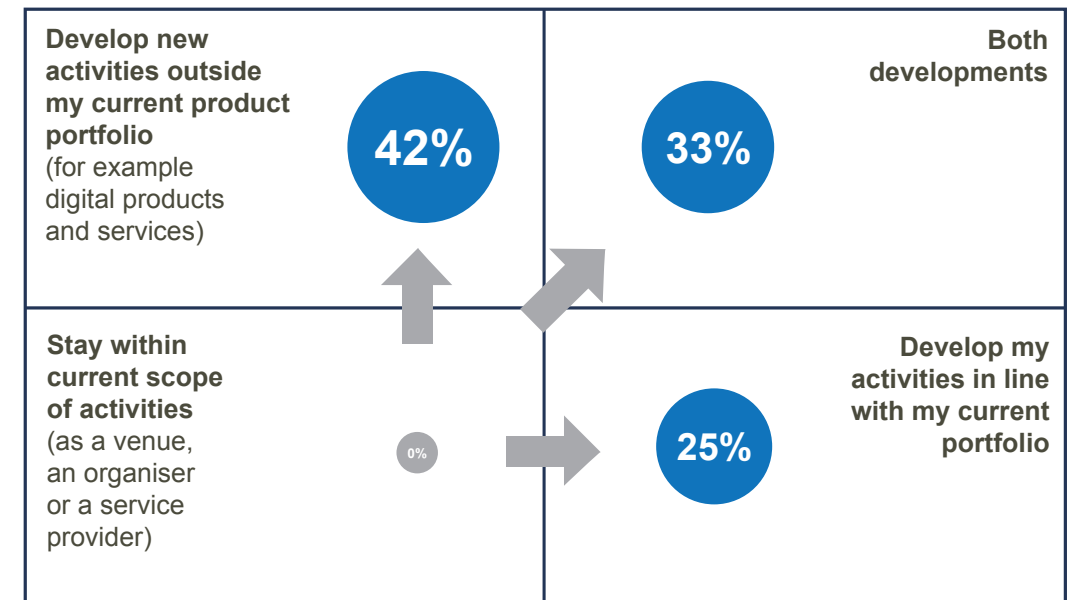
Detailed results for UK



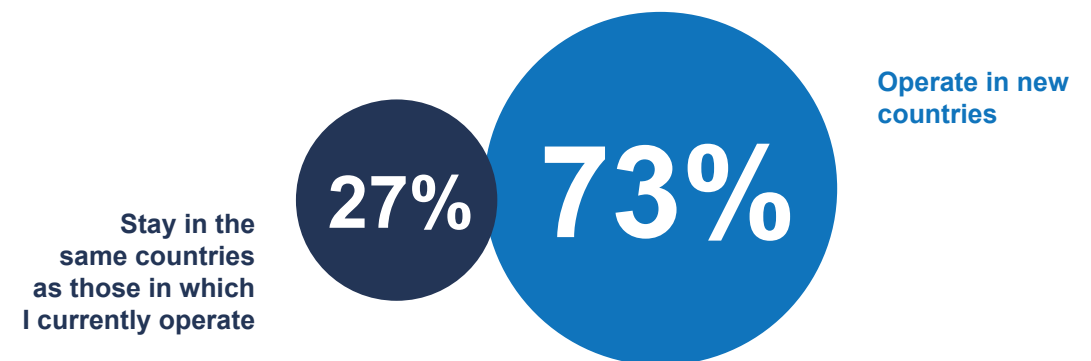
Financial expectations of UK exhibition companies compared to previous years



Current strategic priorities related to the range of activities



Current strategic priorities related to geographic exposure



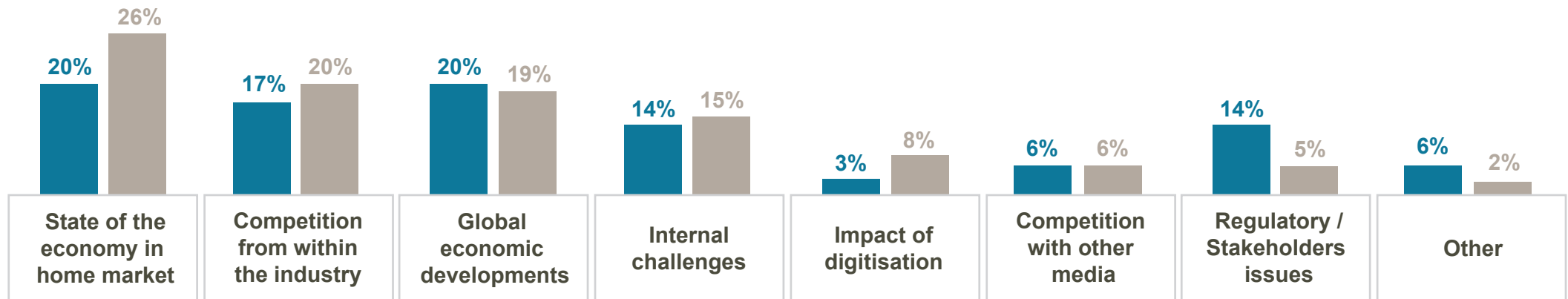
Detailed results for UK



Most important business issues in the exhibition industry in the UK and globally

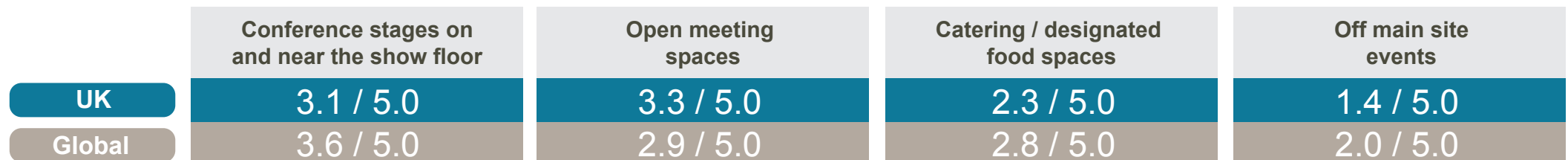
UK

Global

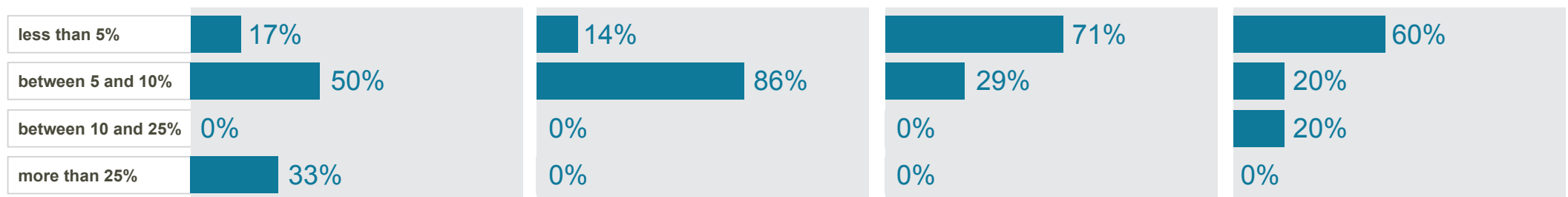


Evolution of the business model for exhibitions

To what degree have you added the following elements to your shows?

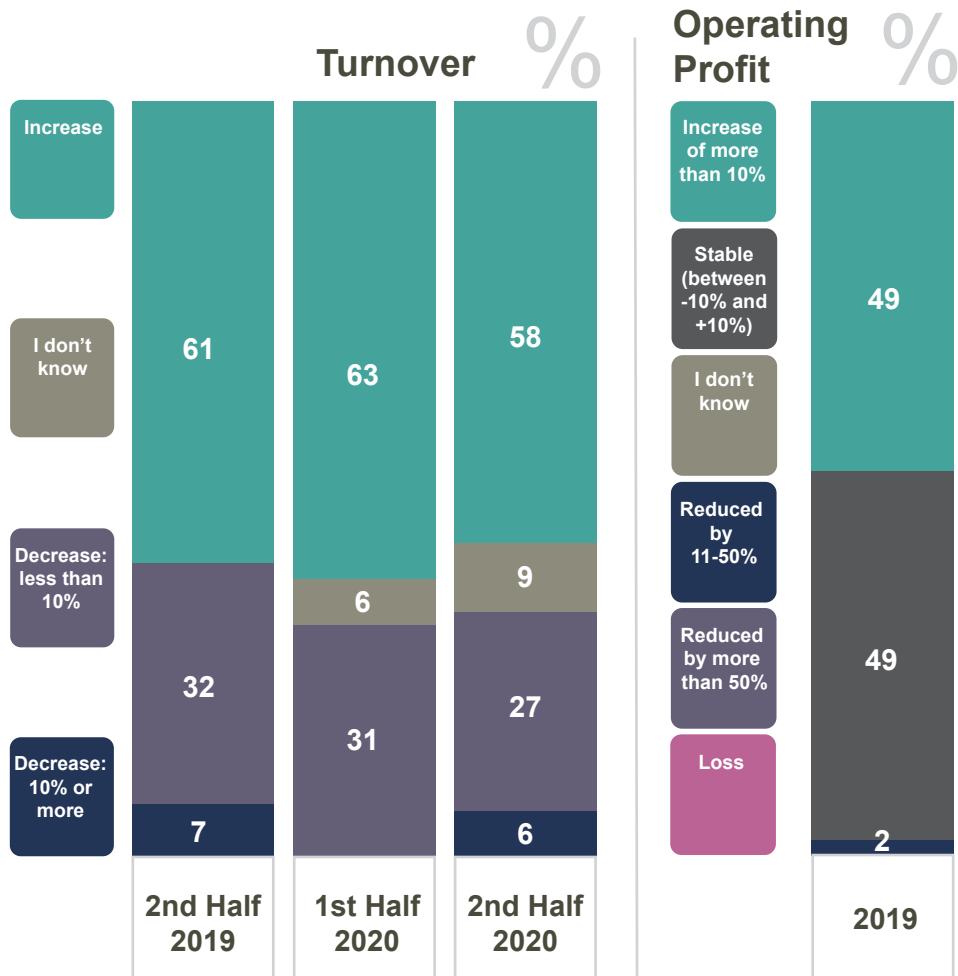


What share of your total space available is used for the respective purposes during your exhibitions?

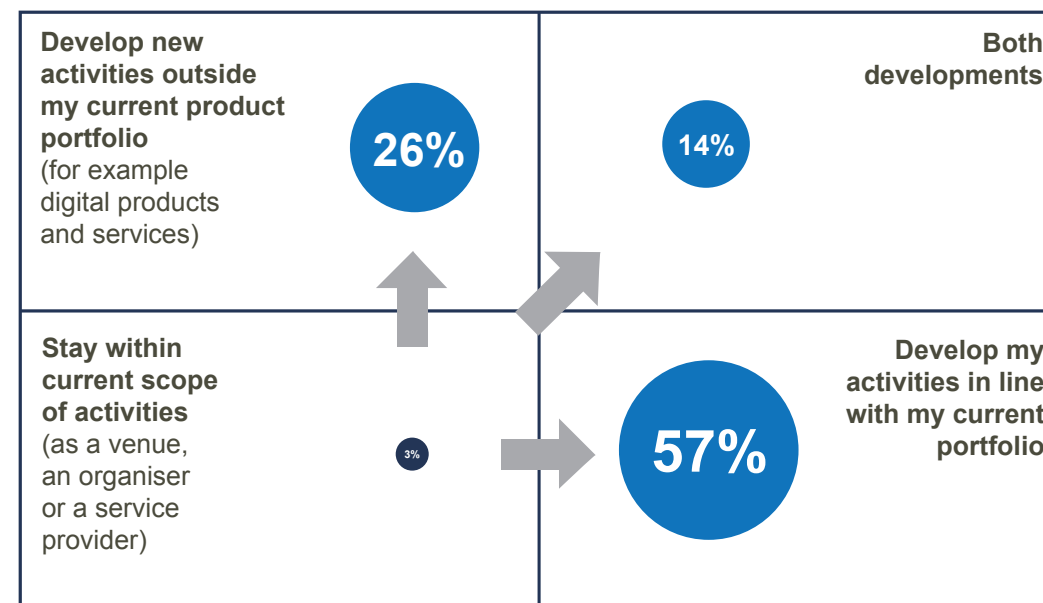


Detailed results for other countries in Europe

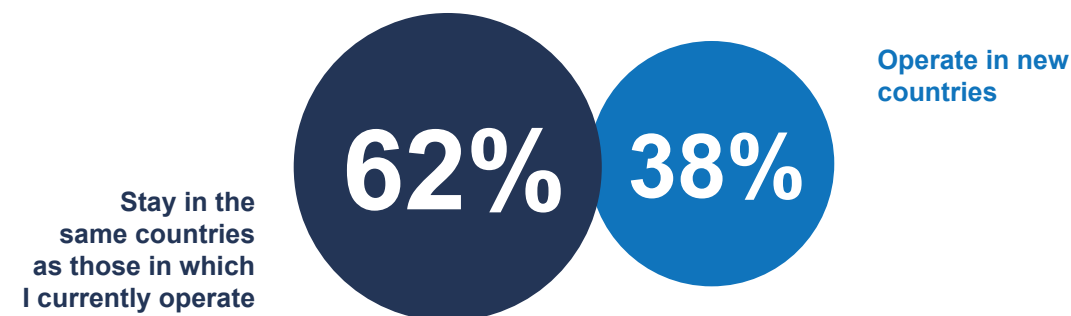
Financial expectations of Other Countries in Europe exhibition companies compared to previous years



Current strategic priorities related to the range of activities



Current strategic priorities related to geographic exposure

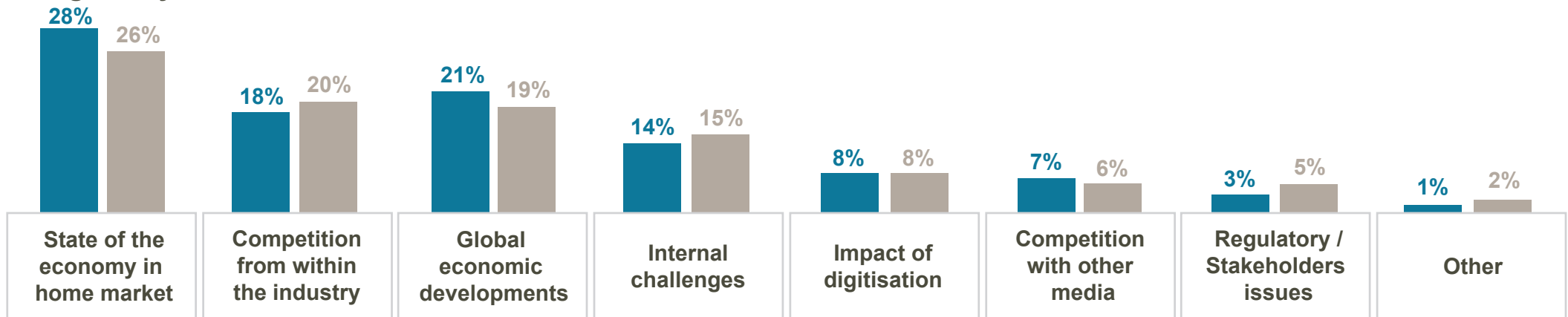


Detailed results for other countries in Europe

Most important business issues in the exhibition industry in Other Countries in Europe and globally

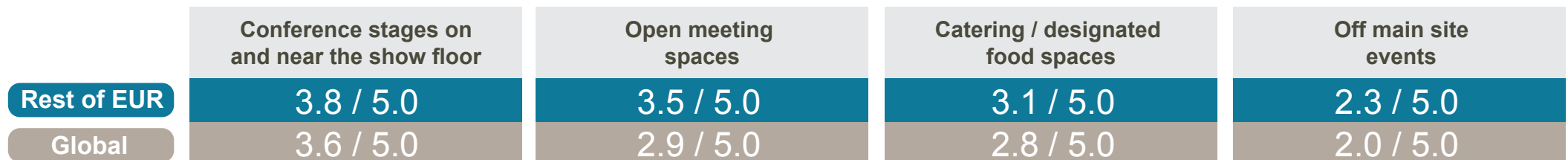
Rest of EUR

Global

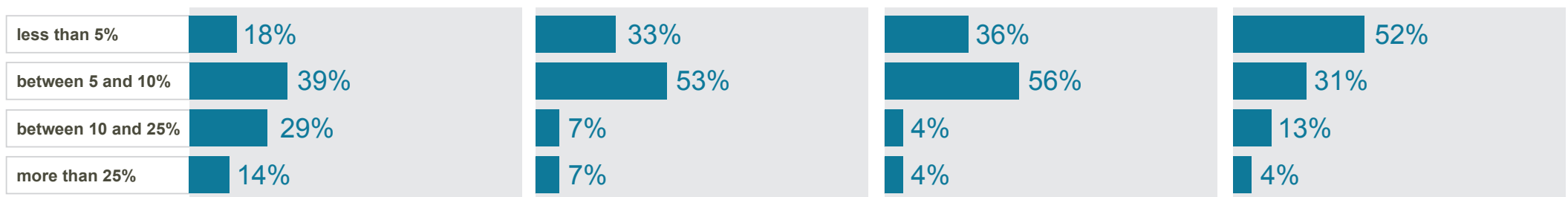


Evolution of the business model for exhibitions

To what degree have you added the following elements to your shows?



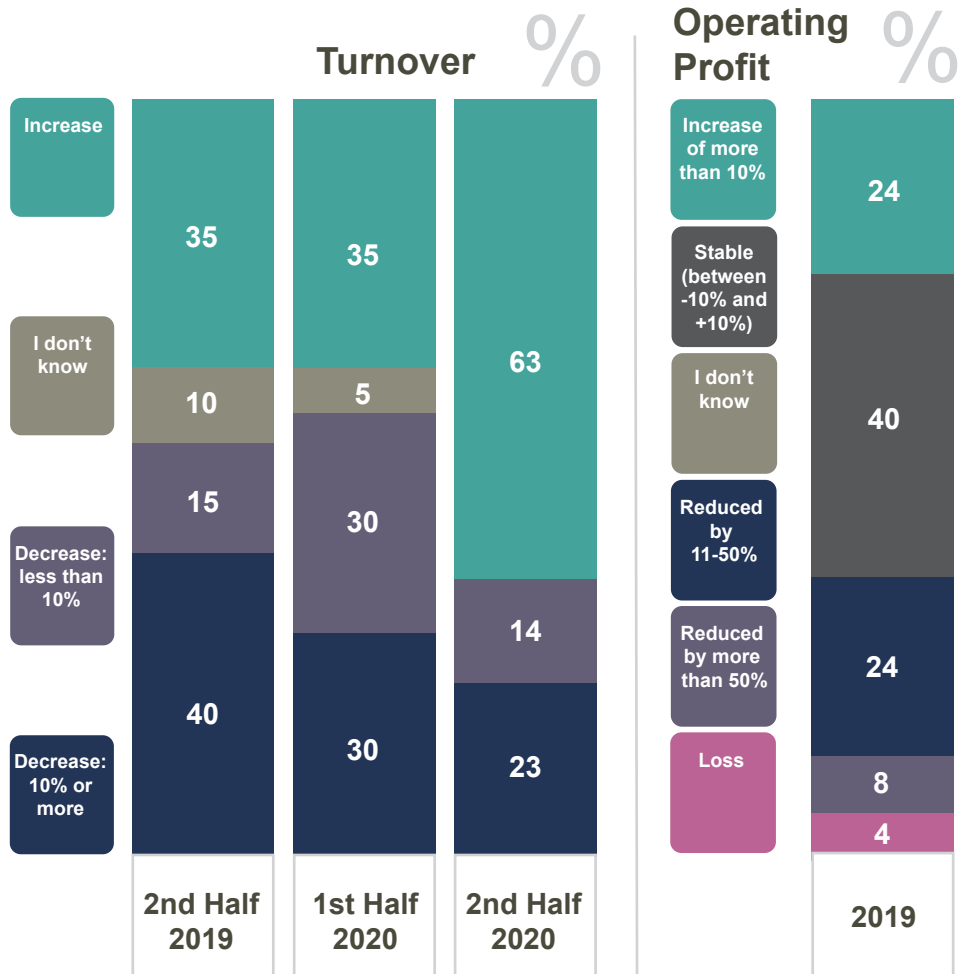
What share of your total space available is used for the respective purposes during your exhibitions?



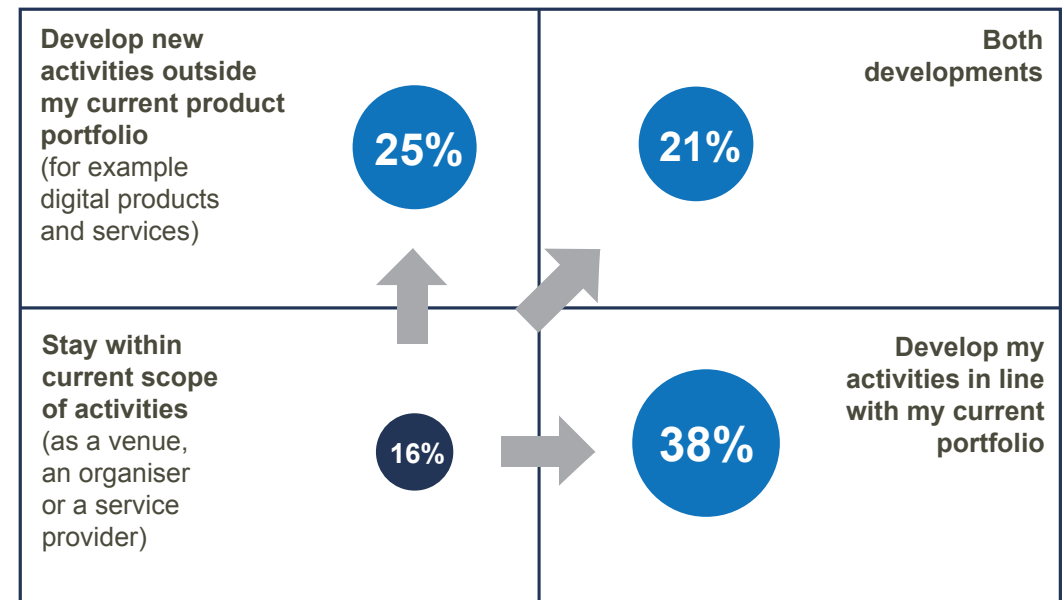
Detailed results for South Africa



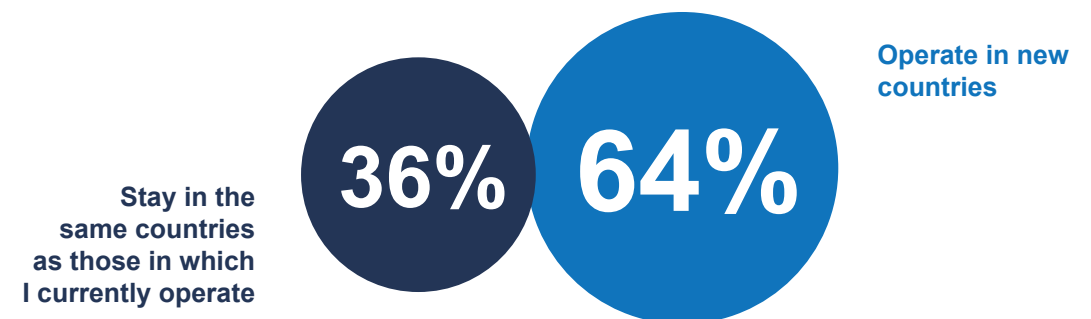
Financial expectations of South African exhibition companies compared to previous years



Current strategic priorities related to the range of activities



Current strategic priorities related to geographic exposure



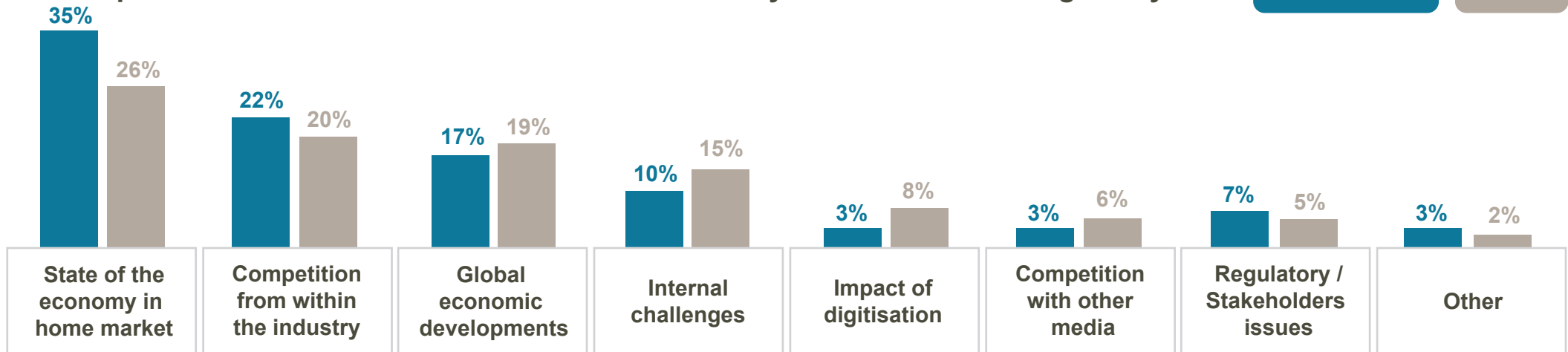
Detailed results for South Africa



Most important business issues in the exhibition industry in South Africa and globally

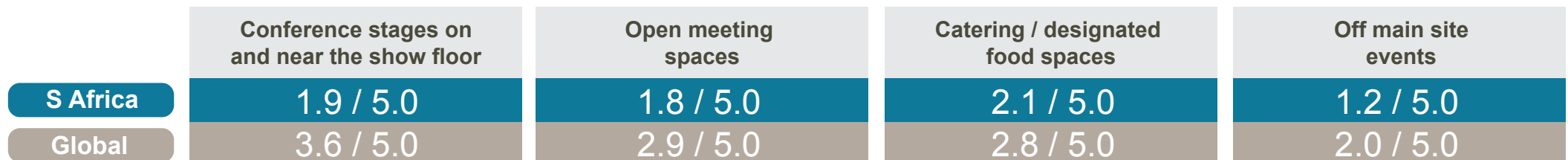
South Africa

Global

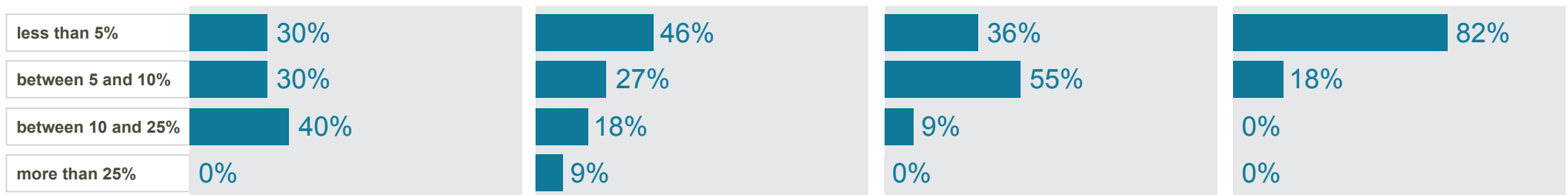


Evolution of the business model for exhibitions

To what degree have you added the following elements to your shows?



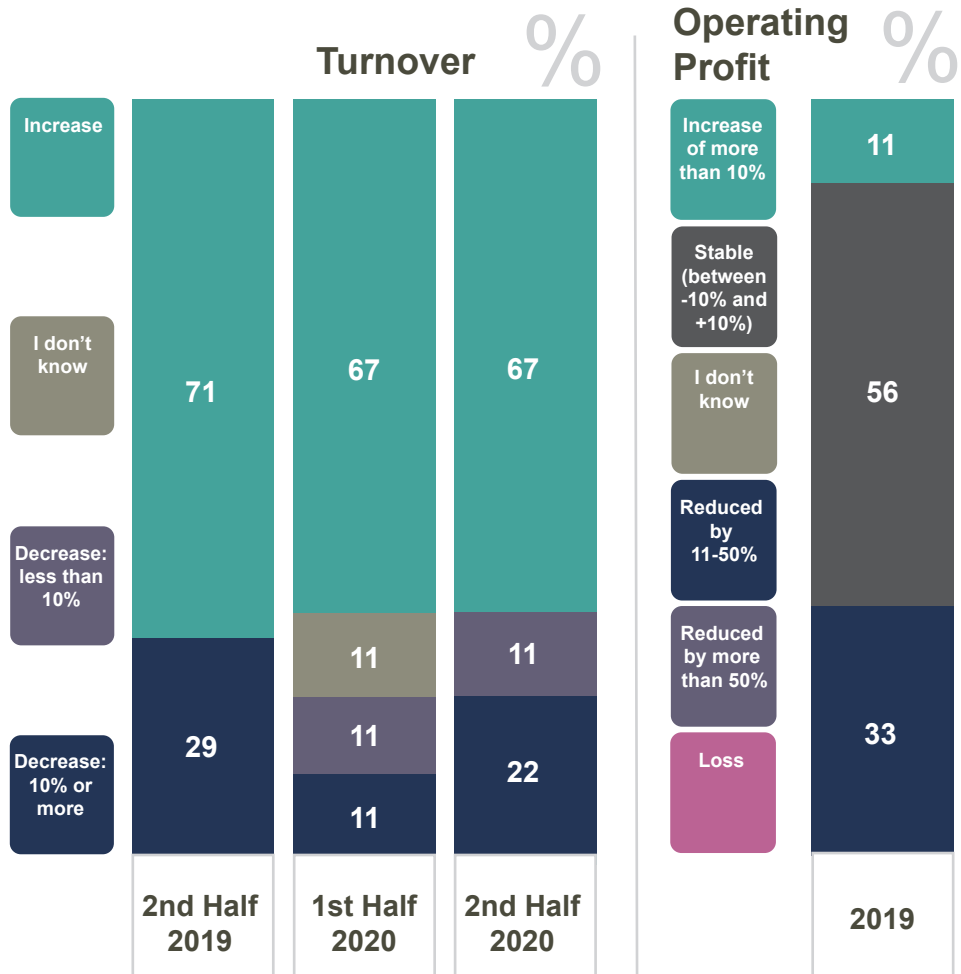
What share of your total space available is used for the respective purposes during your exhibitions?



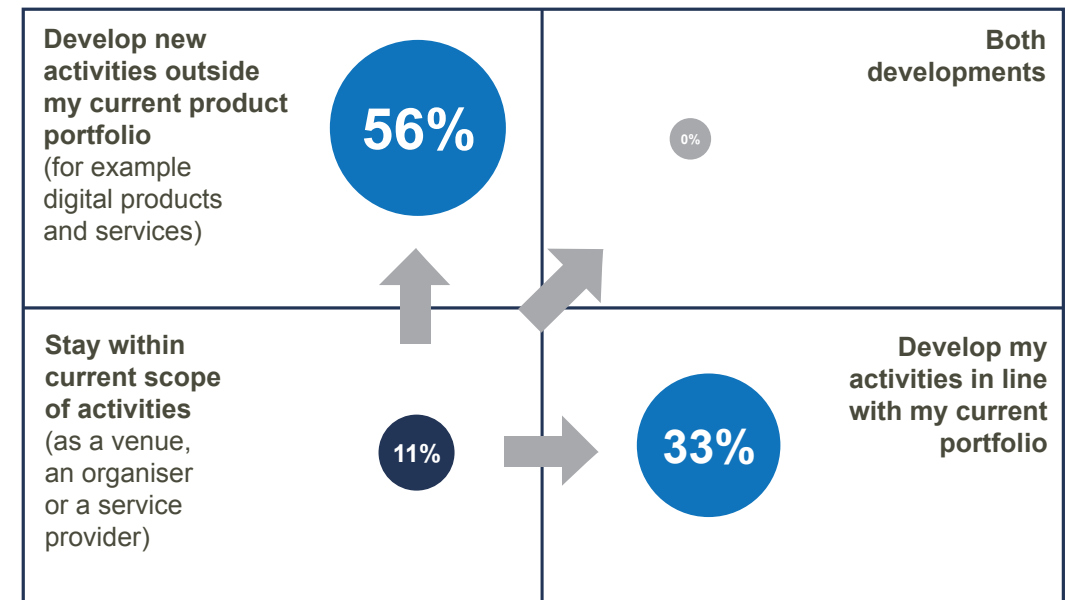
Detailed results for United Arab Emirates



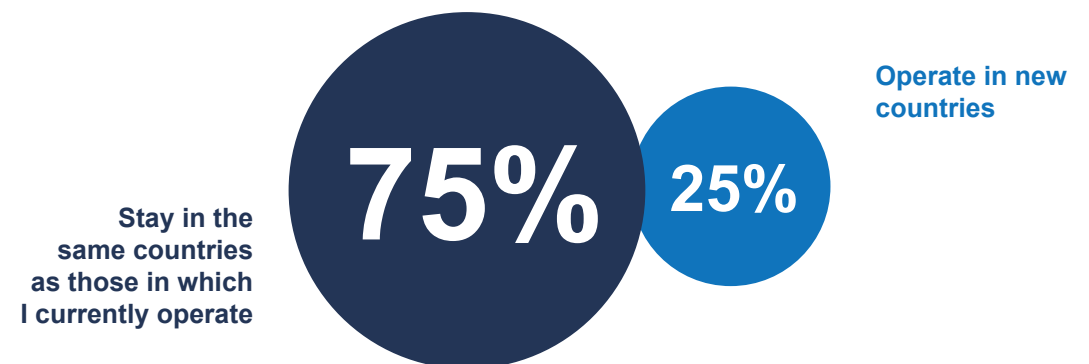
Financial expectations of United Arab Emirates exhibition companies compared to previous years



Current strategic priorities related to the range of activities



Current strategic priorities related to geographic exposure



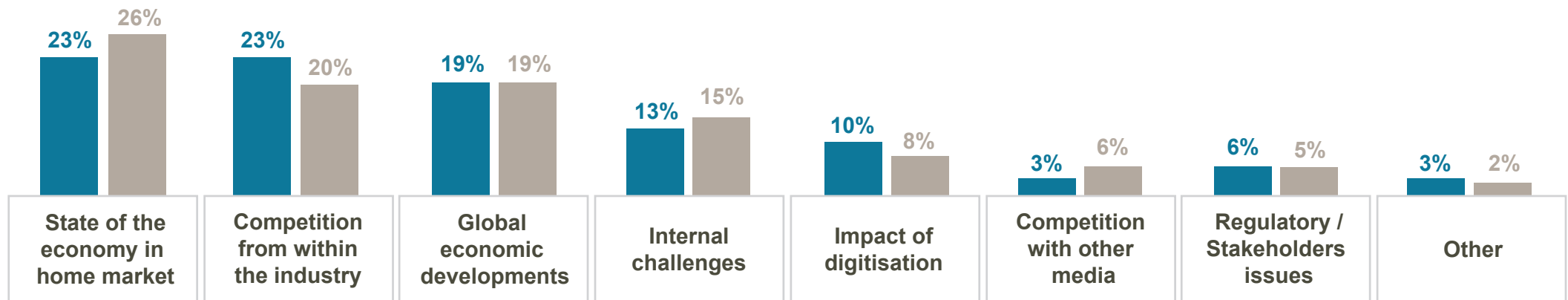
Detailed results for United Arab Emirates



Most important business issues in the exhibition industry in United Arab Emirates and globally

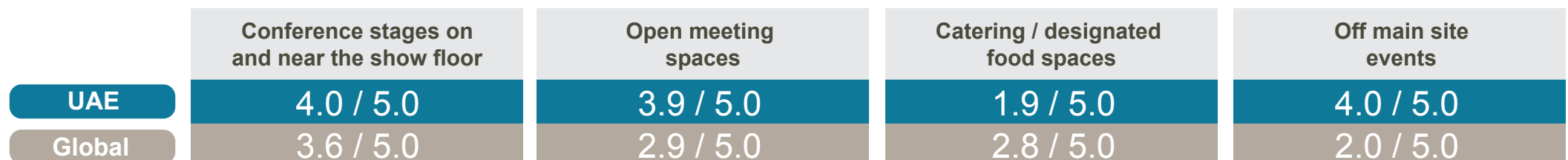
UAE

Global

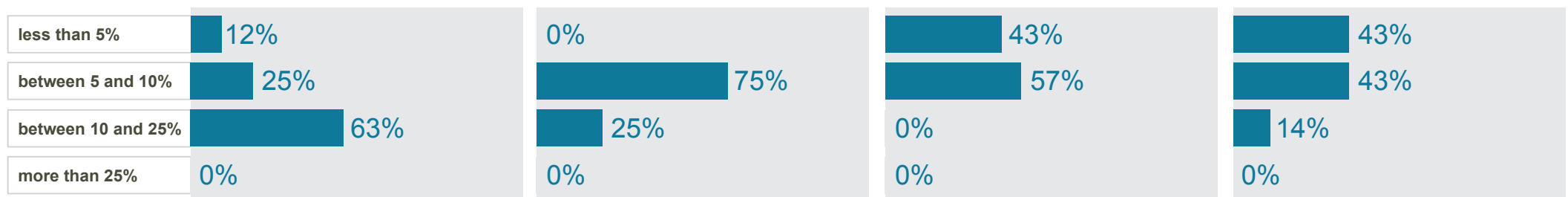


Evolution of the business model for exhibitions

To what degree have you added the following elements to your shows?

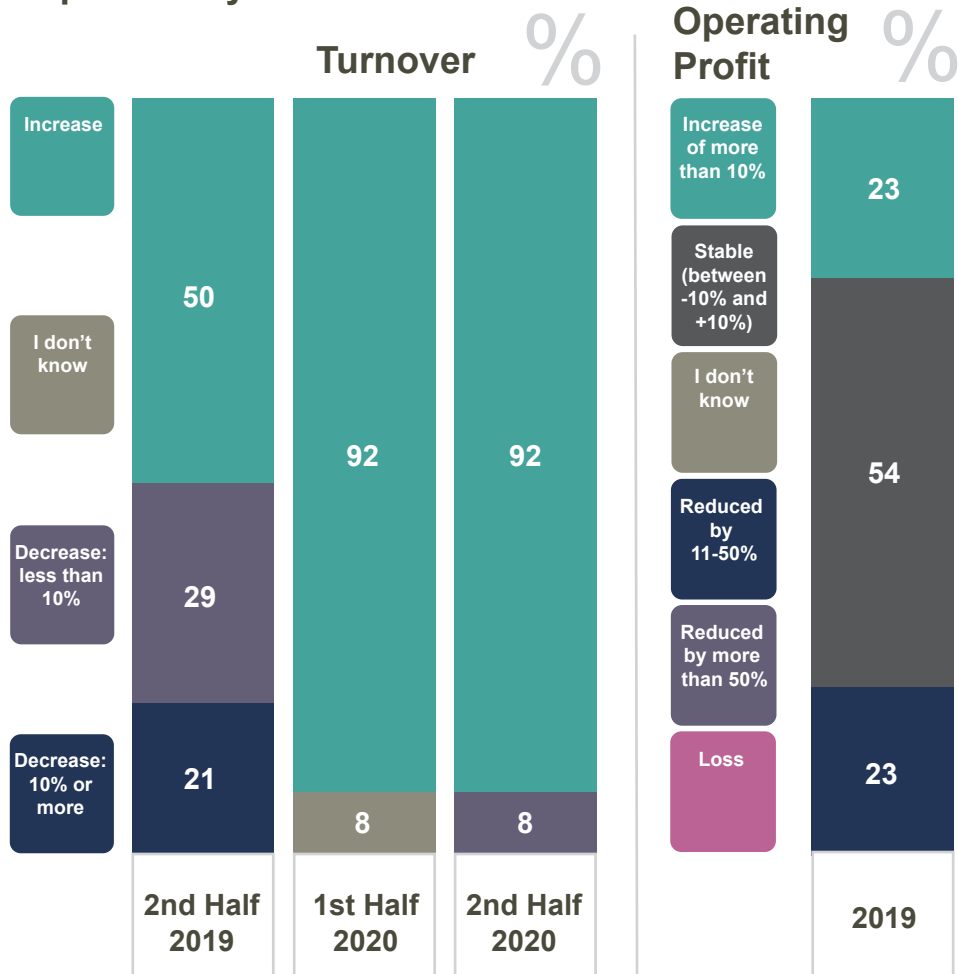


What share of your total space available is used for the respective purposes during your exhibitions?

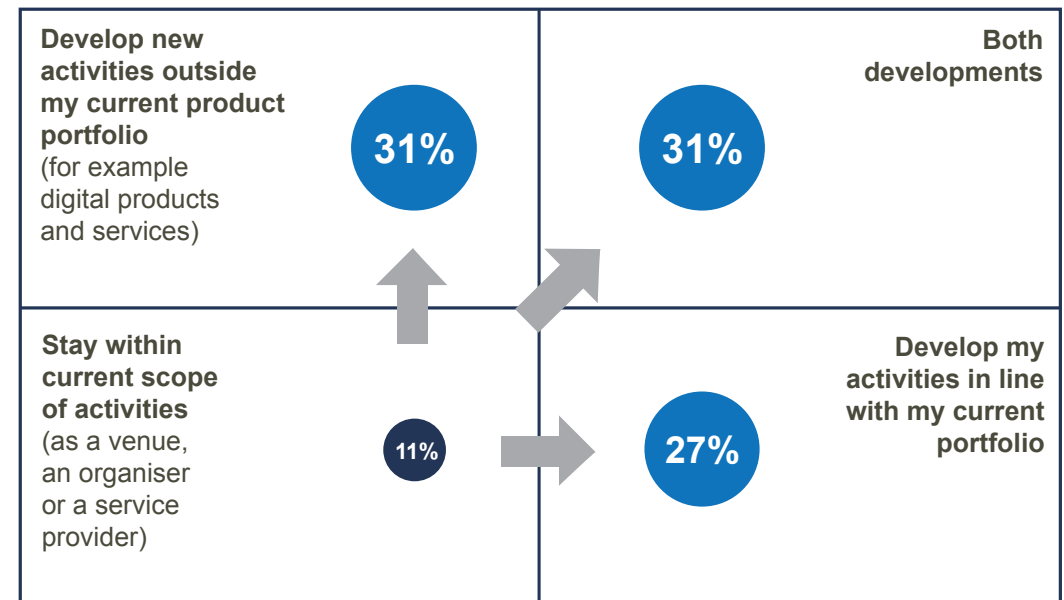


Detailed results for other countries in the Middle East

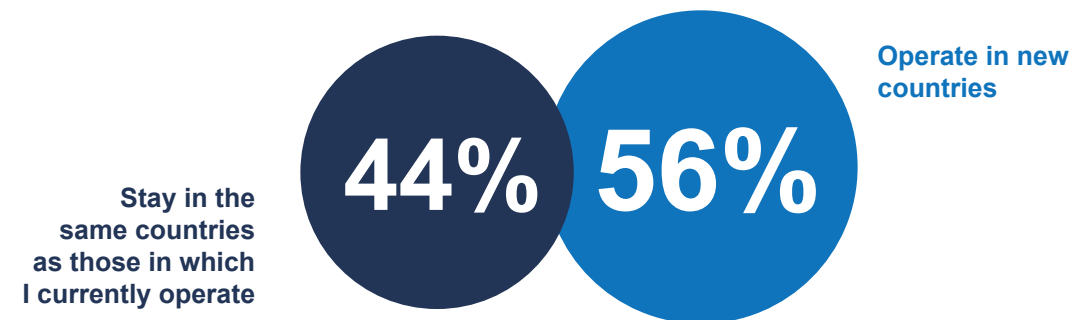
Financial expectations of Other Countries in the Middle East exhibition companies compared to previous years



Current strategic priorities related to the range of activities



Current strategic priorities related to geographic exposure

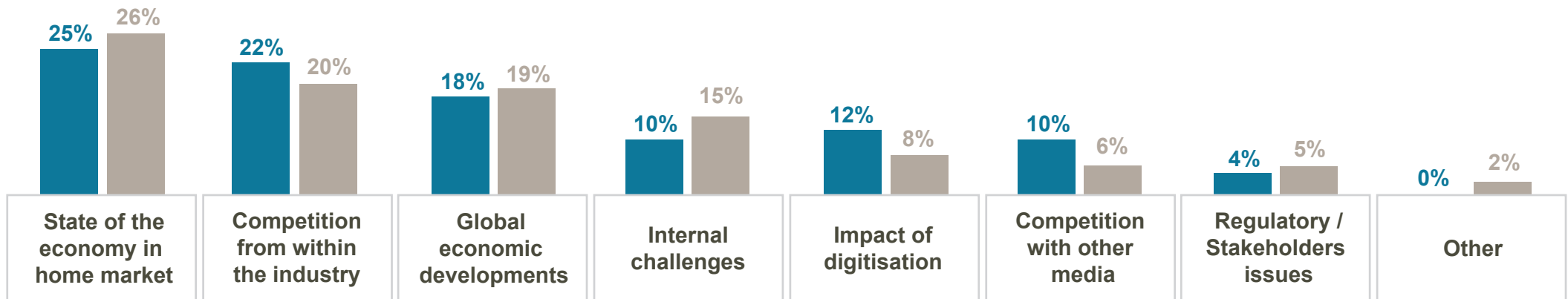


Detailed results for other countries in the Middle East

Most important business issues in the exhibition industry Other Countries in the Middle East and globally

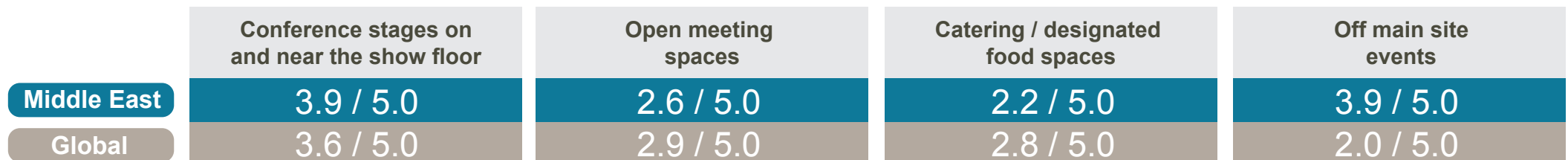
Middle East

Global



Evolution of the business model for exhibitions

To what degree have you added the following elements to your shows?



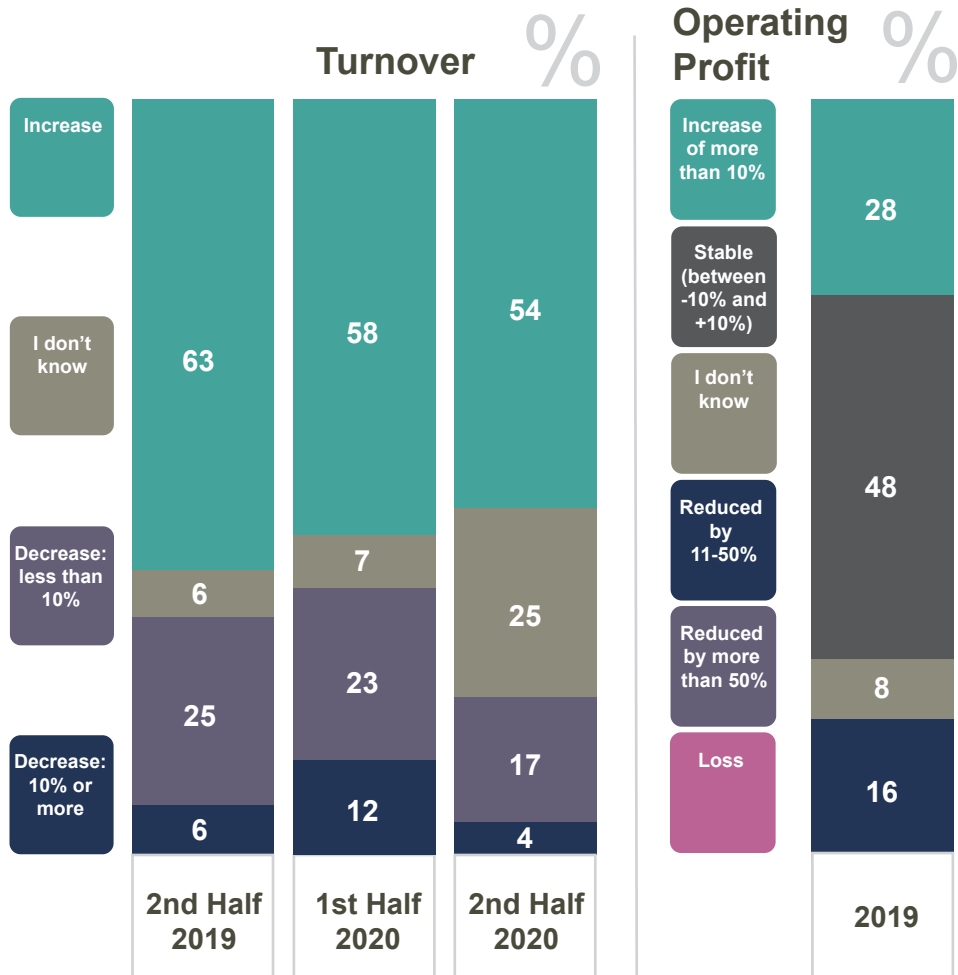
What share of your total space available is used for the respective purposes during your exhibitions?



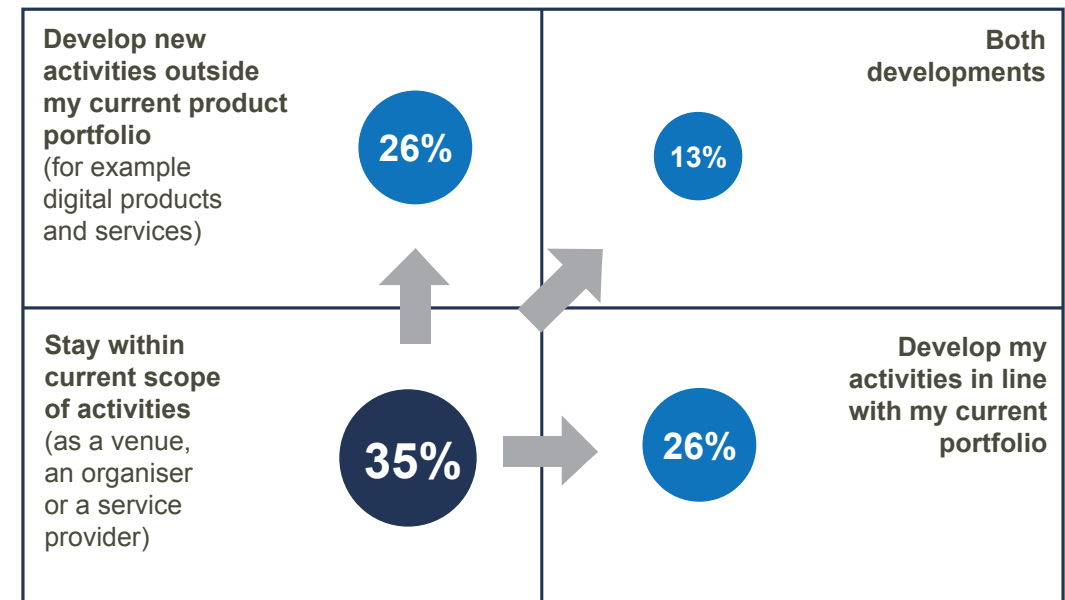
Detailed results for Australia



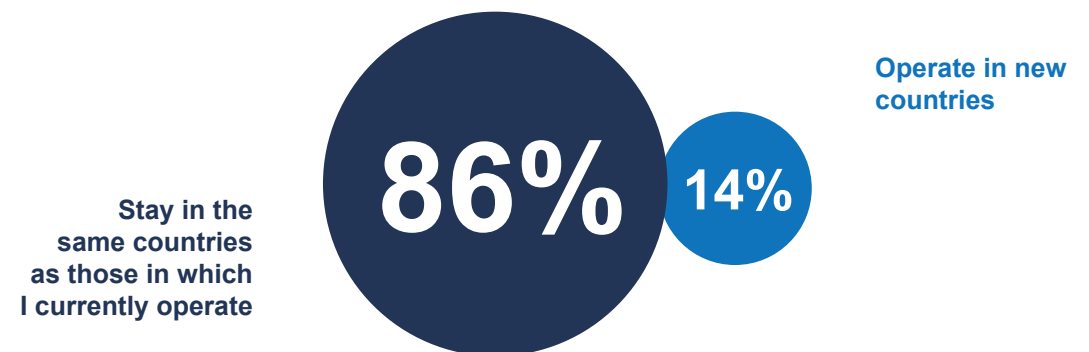
Financial expectations of Australian exhibition companies compared to previous years



Current strategic priorities related to the range of activities



Current strategic priorities related to geographic exposure



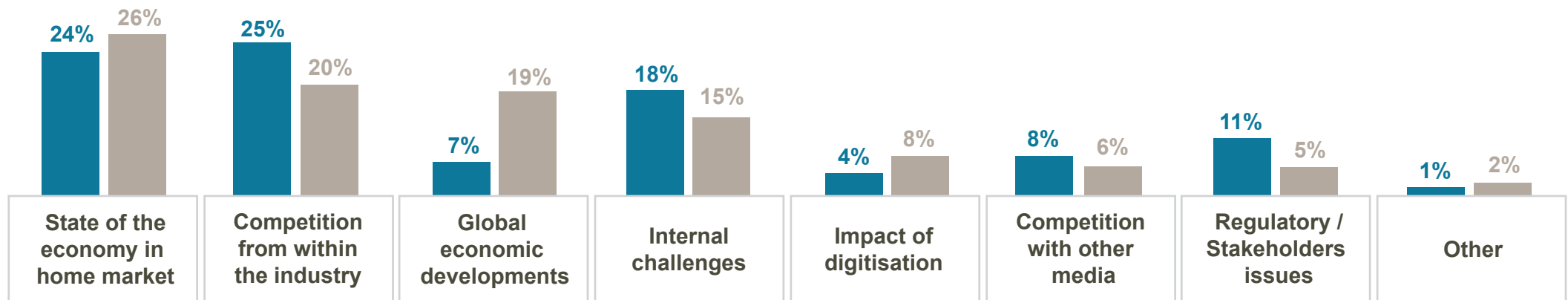
Detailed results for Australia



Most important business issues in the exhibition industry in Australia and globally

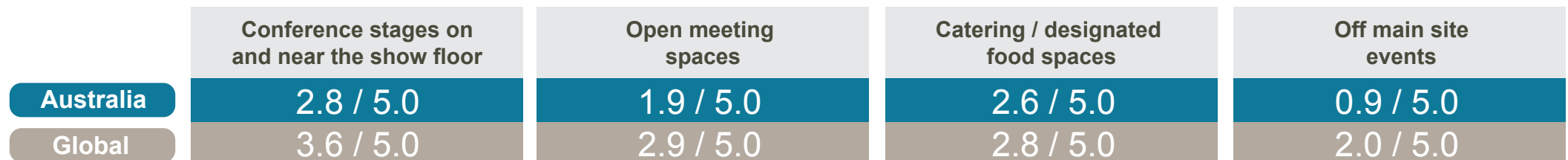
Australia

Global

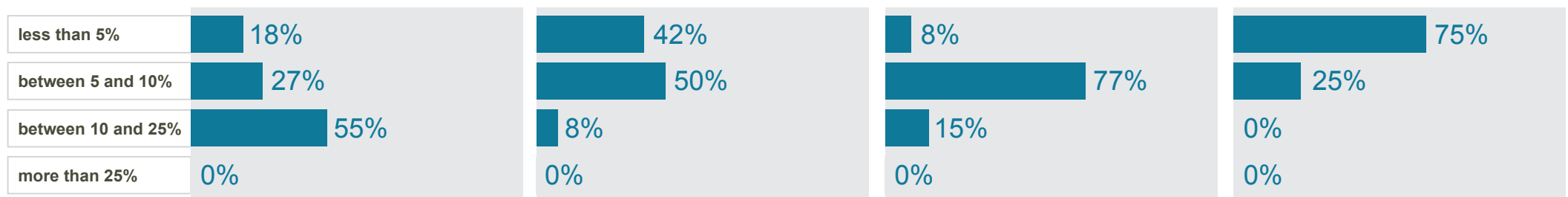


Evolution of the business model for exhibitions

To what degree have you added the following elements to your shows?



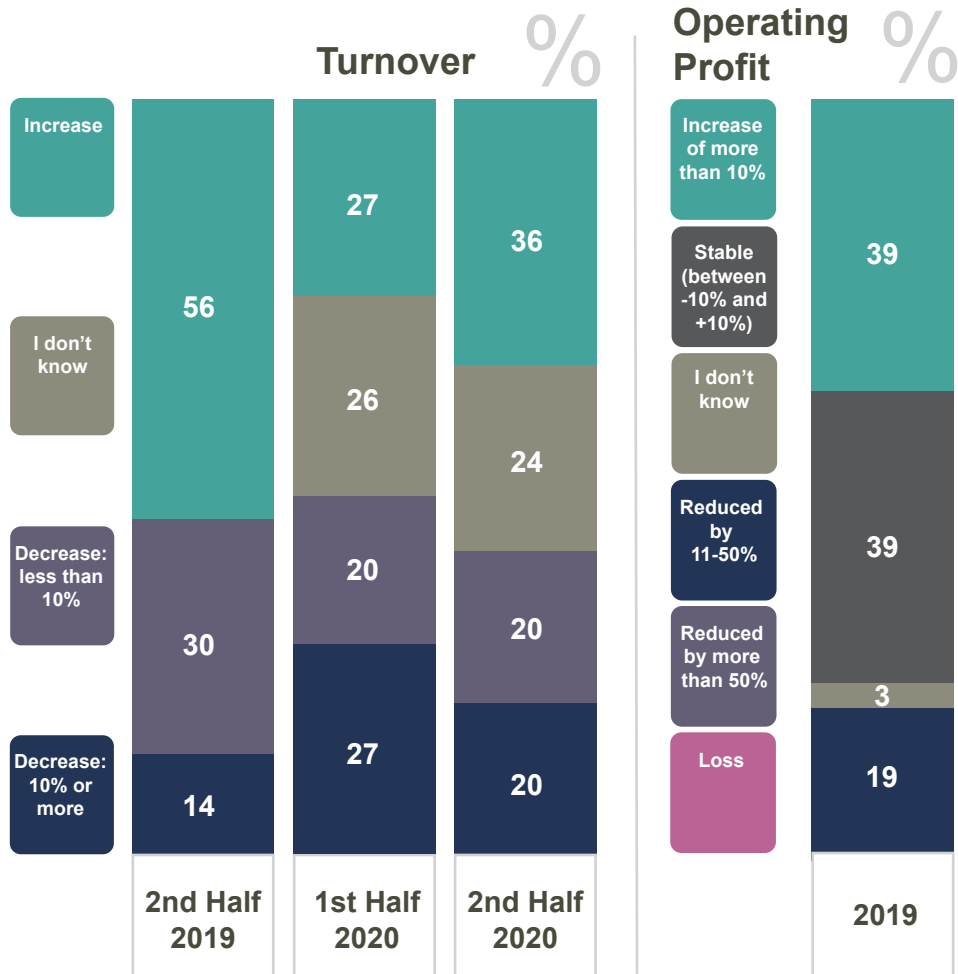
What share of your total space available is used for the respective purposes during your exhibitions?



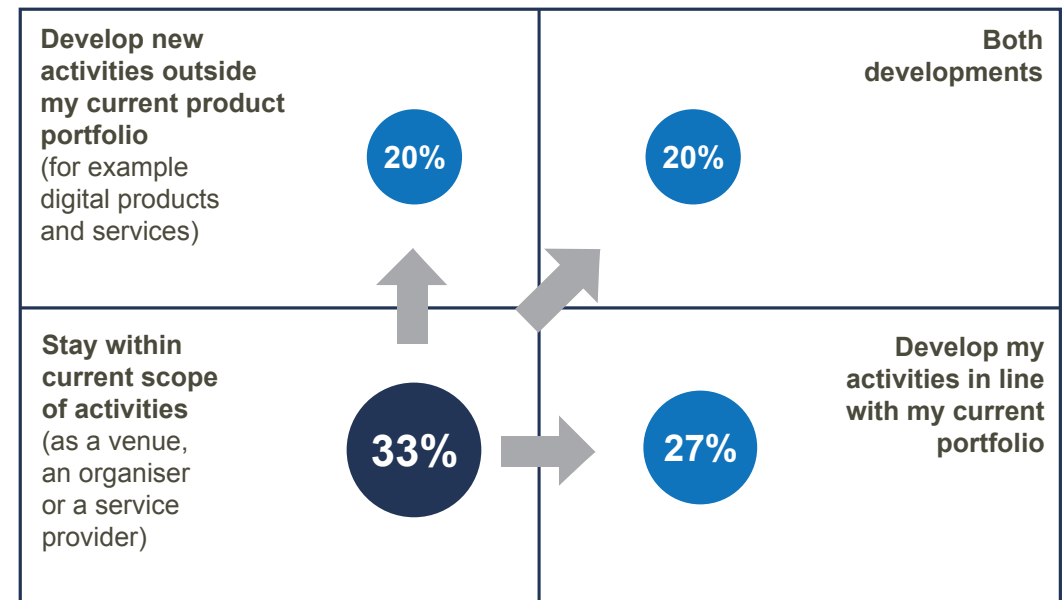
Detailed results for China



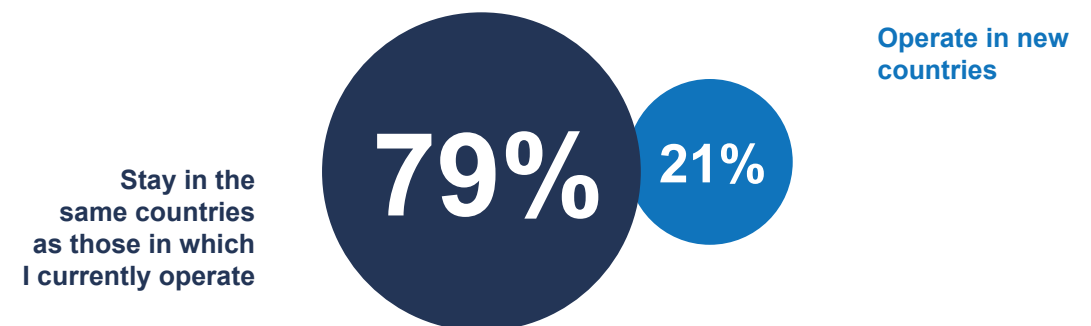
Financial expectations of Chinese exhibition companies compared to previous years



Current strategic priorities related to the range of activities



Current strategic priorities related to geographic exposure



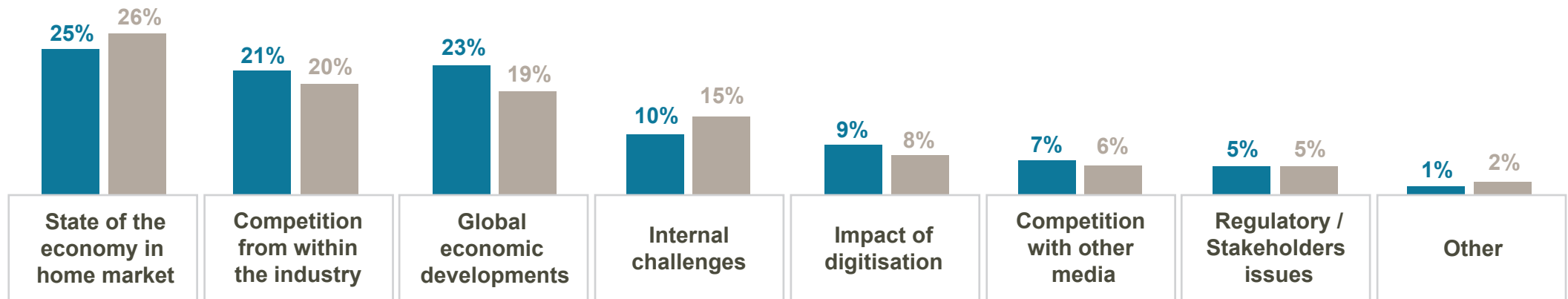
Detailed results for China



Most important business issues in the exhibition industry in China and globally

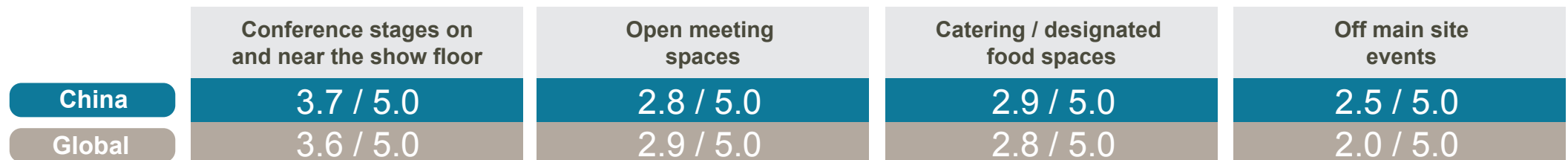
China

Global

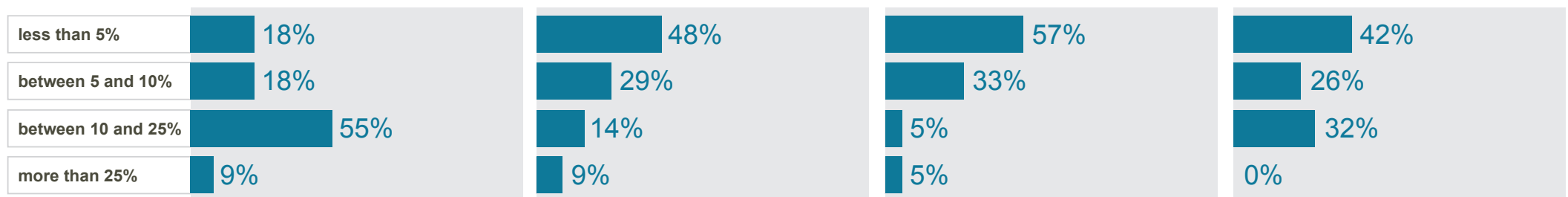


Evolution of the business model for exhibitions

To what degree have you added the following elements to your shows?



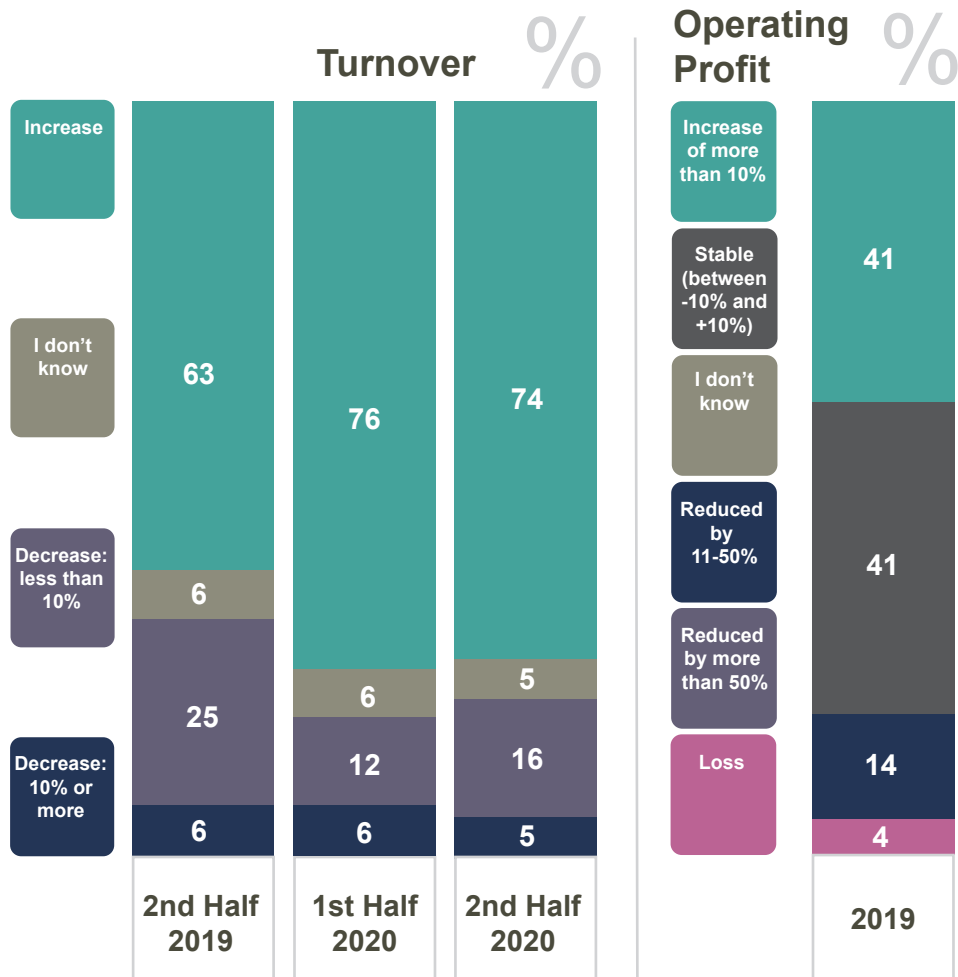
What share of your total space available is used for the respective purposes during your exhibitions?



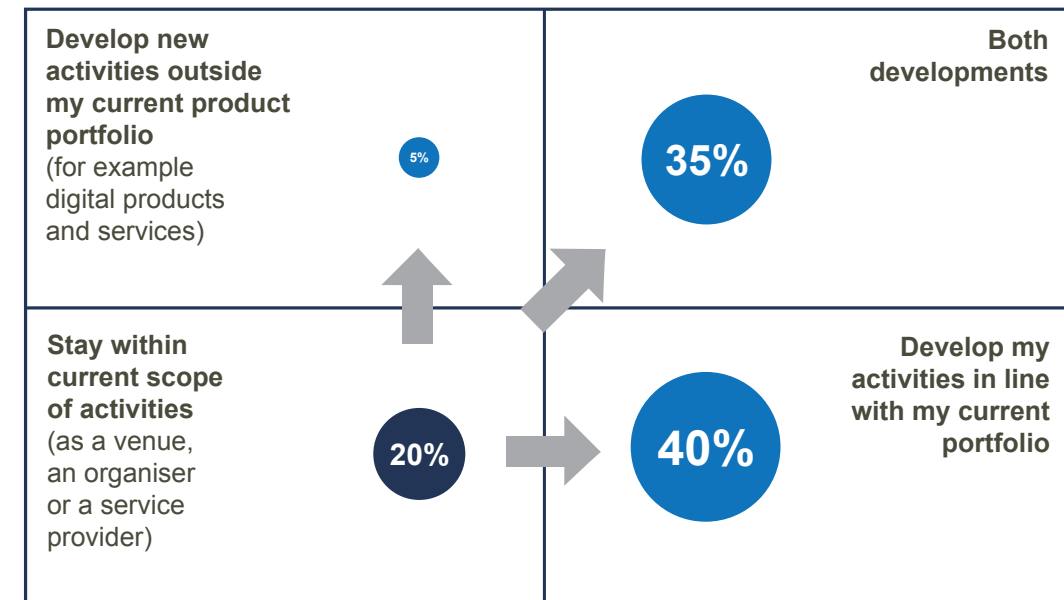
Detailed results for India



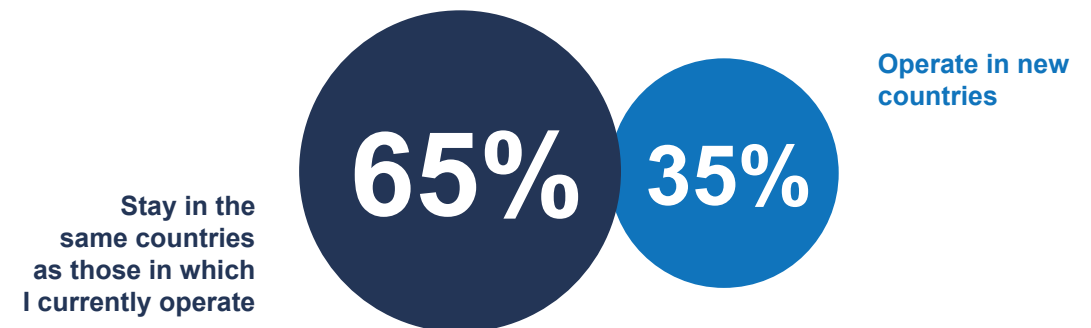
Financial expectations of Indian exhibition companies compared to previous years



Current strategic priorities related to the range of activities



Current strategic priorities related to geographic exposure



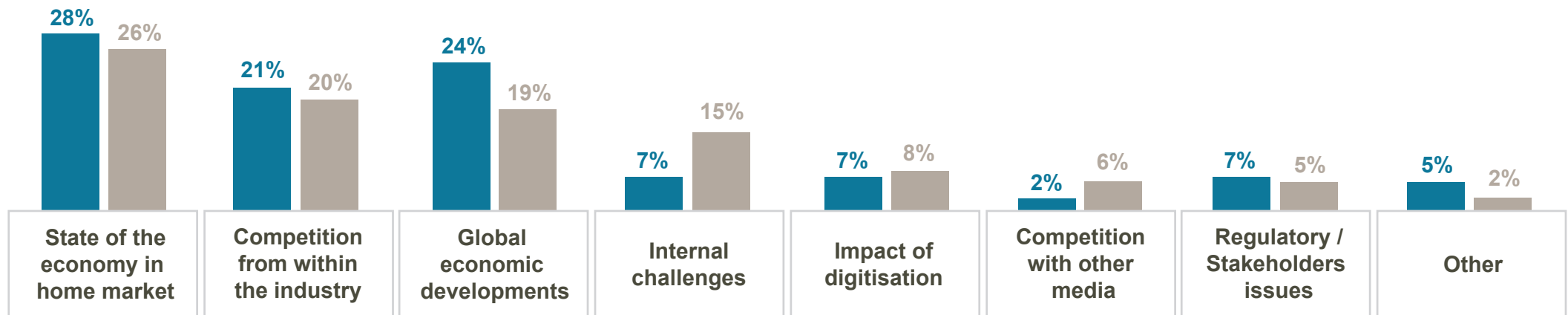
Detailed results for India



Most important business issues in the exhibition industry in India and globally

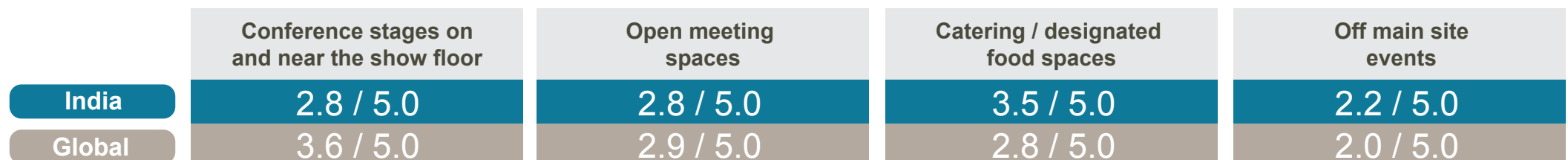
India

Global



Evolution of the business model for exhibitions

To what degree have you added the following elements to your shows?



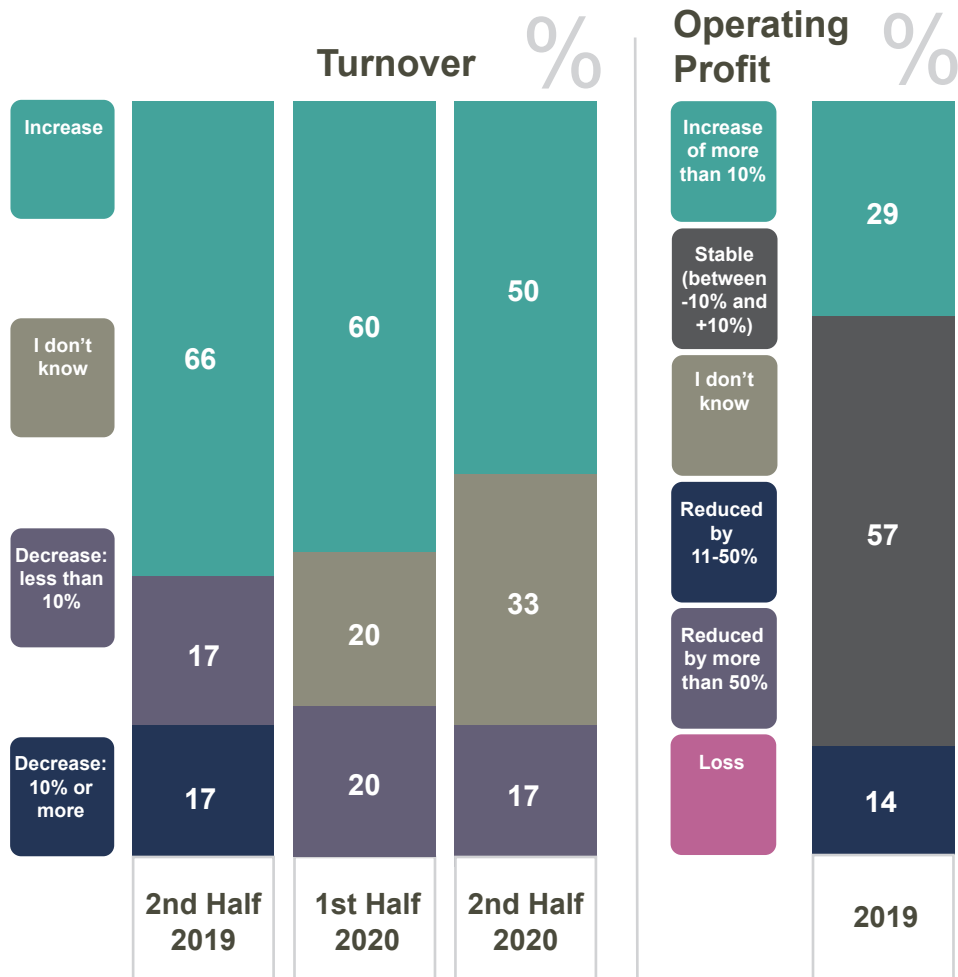
What share of your total space available is used for the respective purposes during your exhibitions?



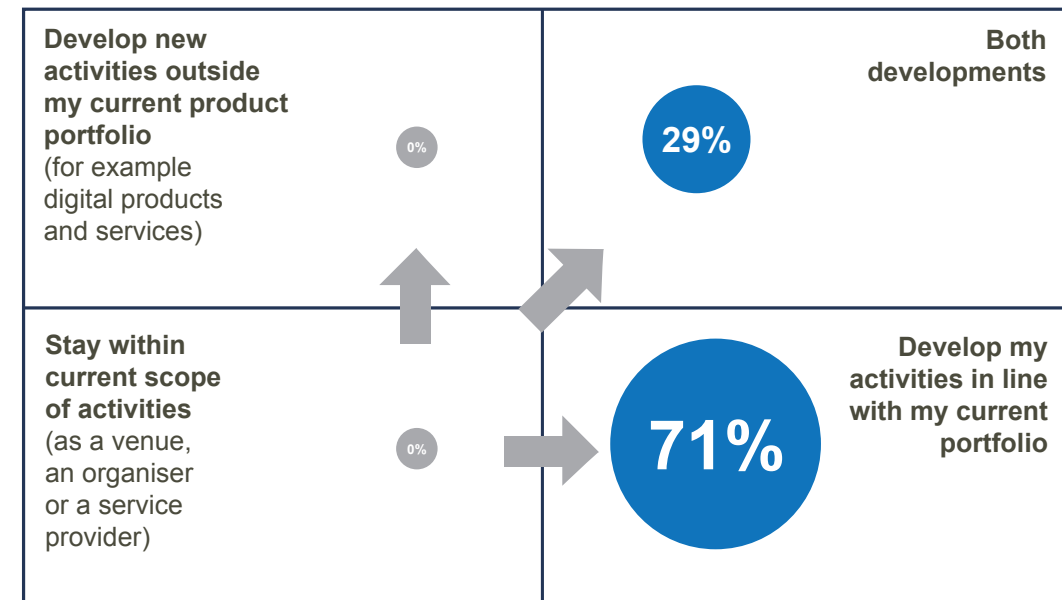
Detailed results for Indonesia



Financial expectations of Indonesian exhibition companies compared to previous years



Current strategic priorities related to the range of activities



Current strategic priorities related to geographic exposure



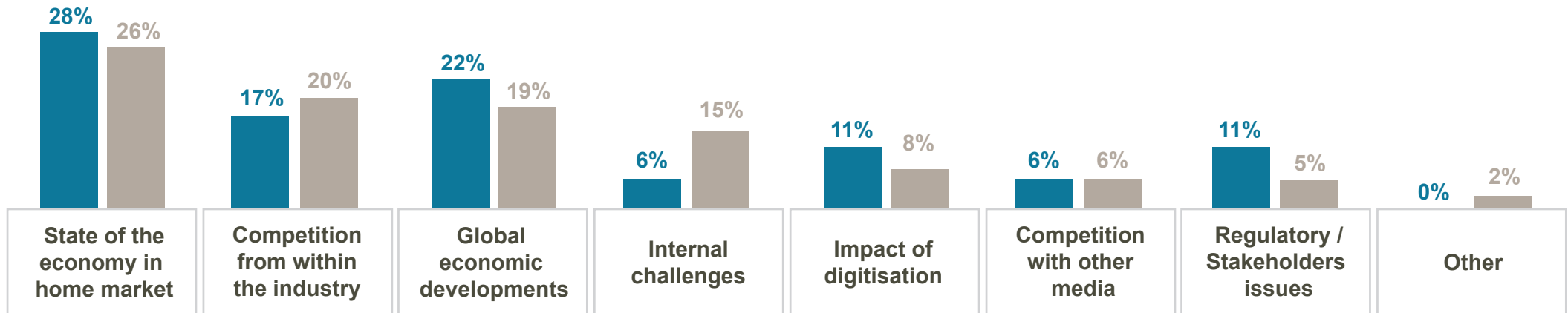
Detailed results for Indonesia



Most important business issues in the exhibition industry in Indonesia and globally

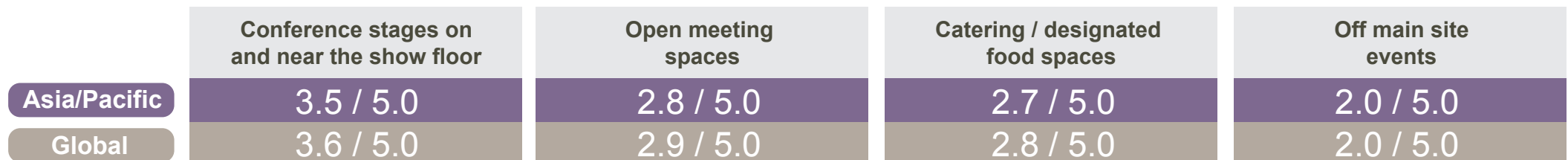
Indonesia

Global

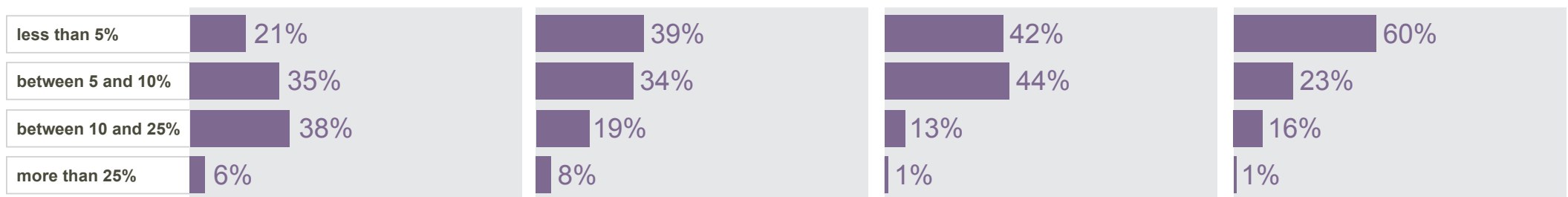


Evolution of the business model for exhibitions

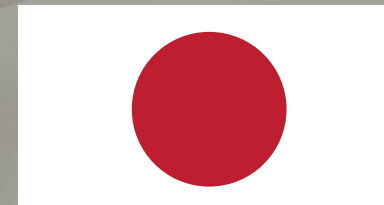
To what degree have you added the following elements to your shows?



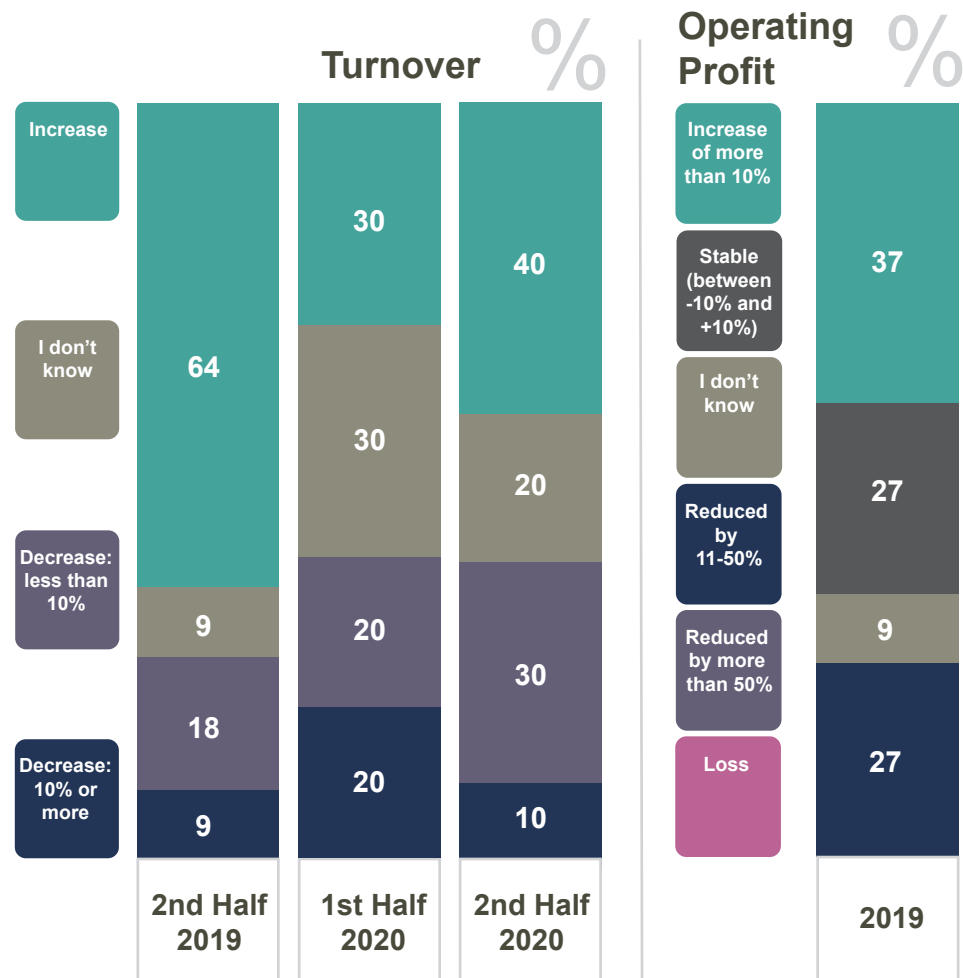
What share of your total space available is used for the respective purposes during your exhibitions?



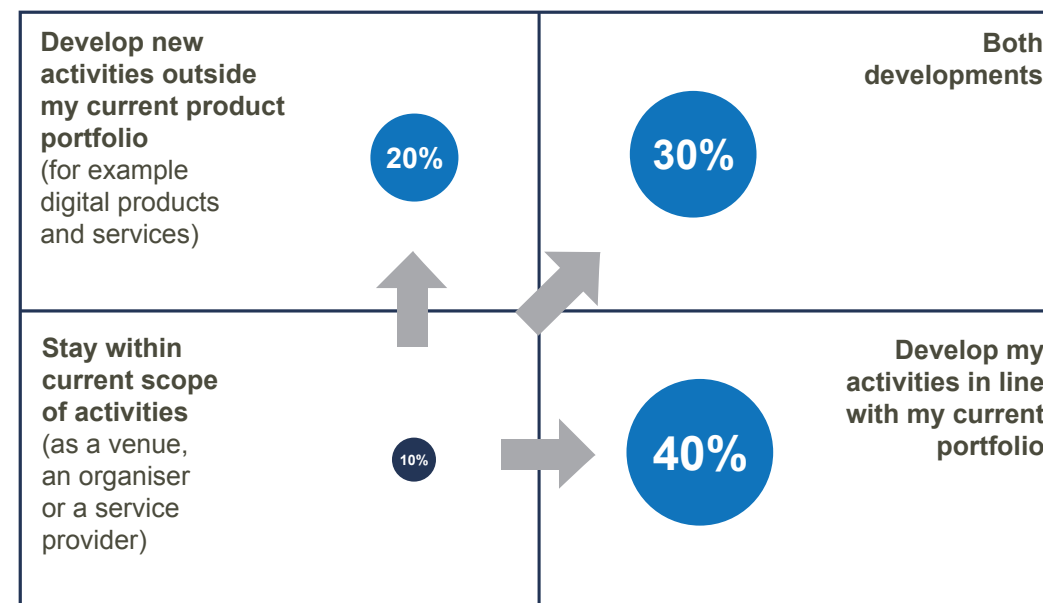
Detailed results for Japan



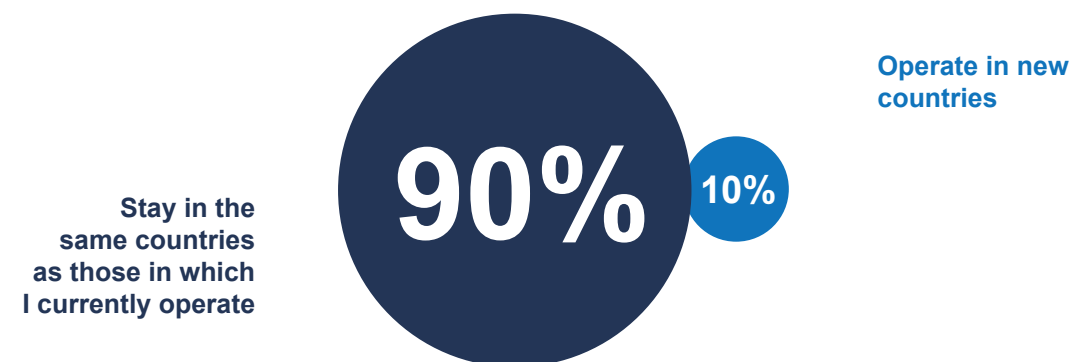
Financial expectations of Japanese exhibition companies compared to previous years



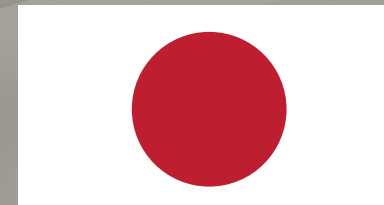
Current strategic priorities related to the range of activities



Current strategic priorities related to geographic exposure



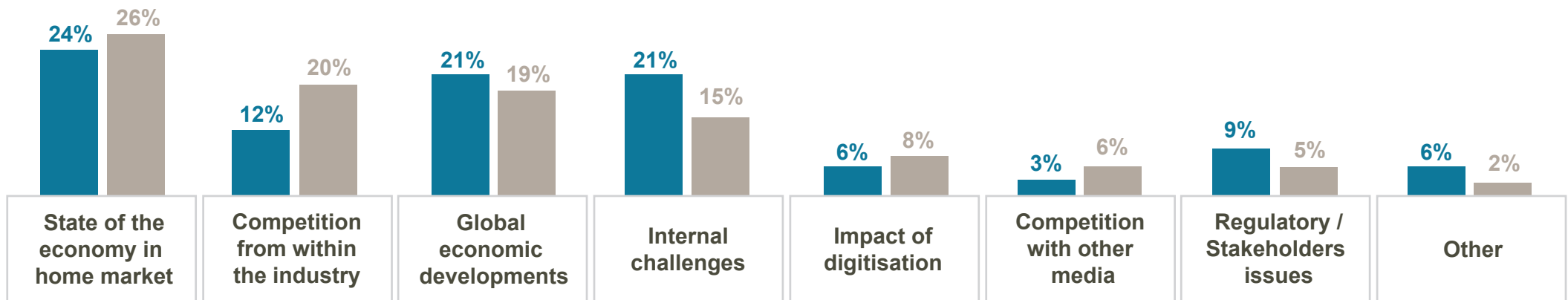
Detailed results for Japan



Most important business issues in the exhibition industry in Japan and globally

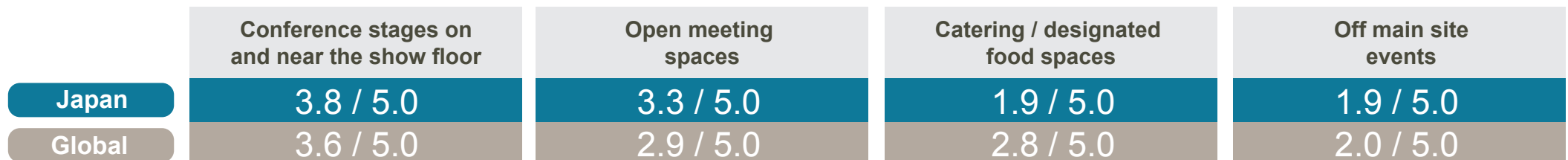
Japan

Global

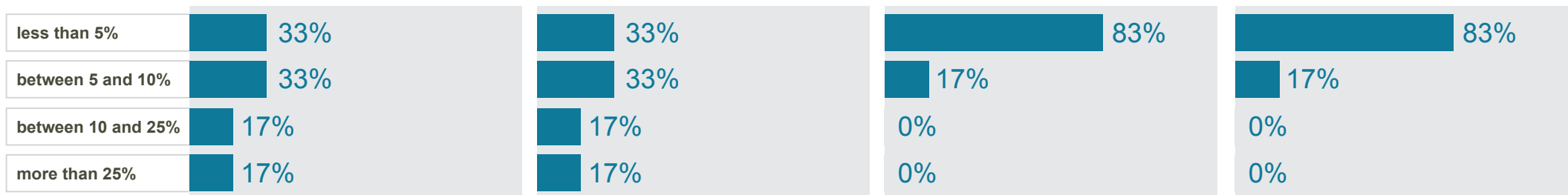


Evolution of the business model for exhibitions

To what degree have you added the following elements to your shows?



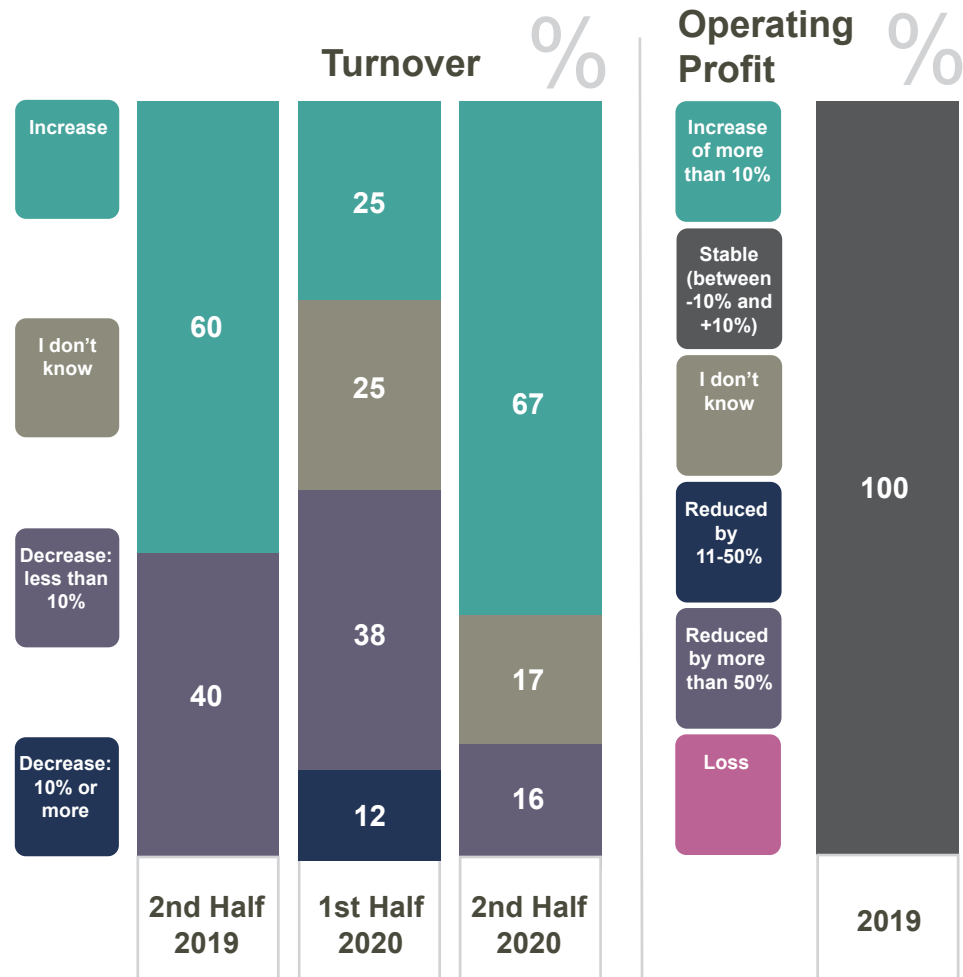
What share of your total space available is used for the respective purposes during your exhibitions?



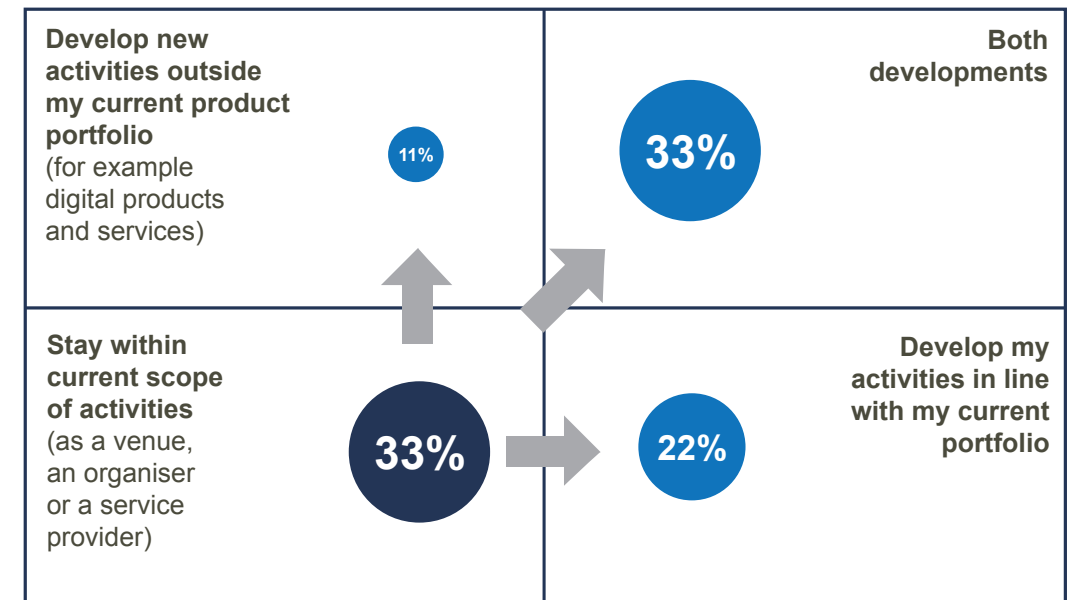
Detailed results for Macau



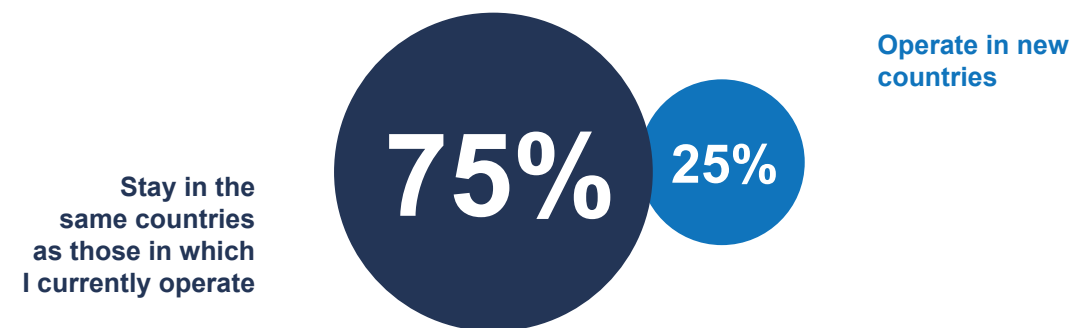
Financial expectations of Macau exhibition companies compared to previous years



Current strategic priorities related to the range of activities



Current strategic priorities related to geographic exposure



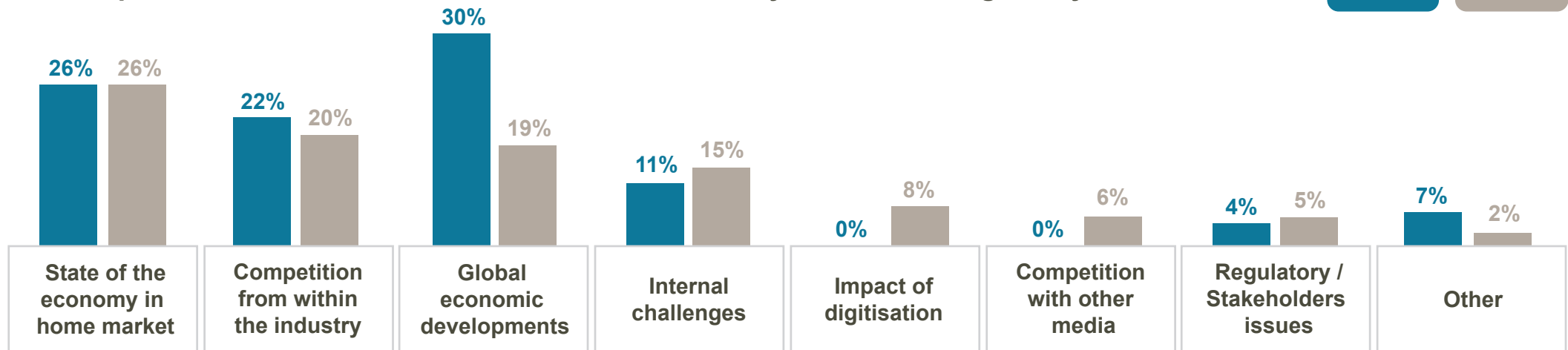
Detailed results for Macau



Most important business issues in the exhibition industry in Macau and globally

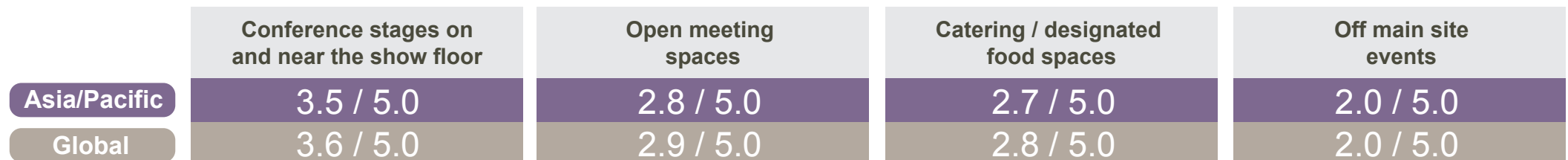
Macau

Global

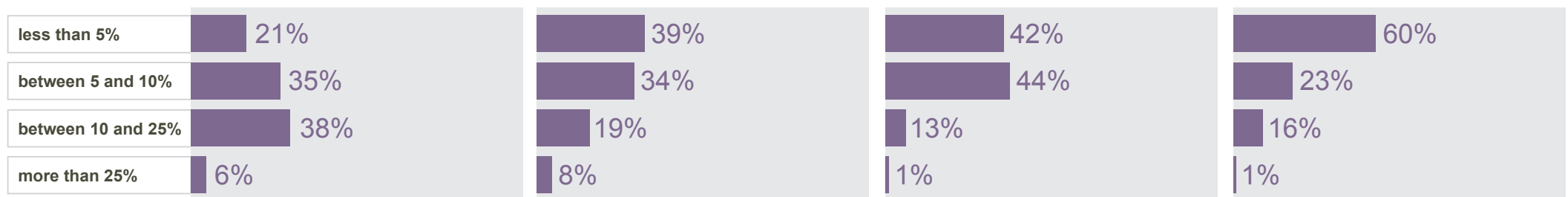


Evolution of the business model for exhibitions

To what degree have you added the following elements to your shows?



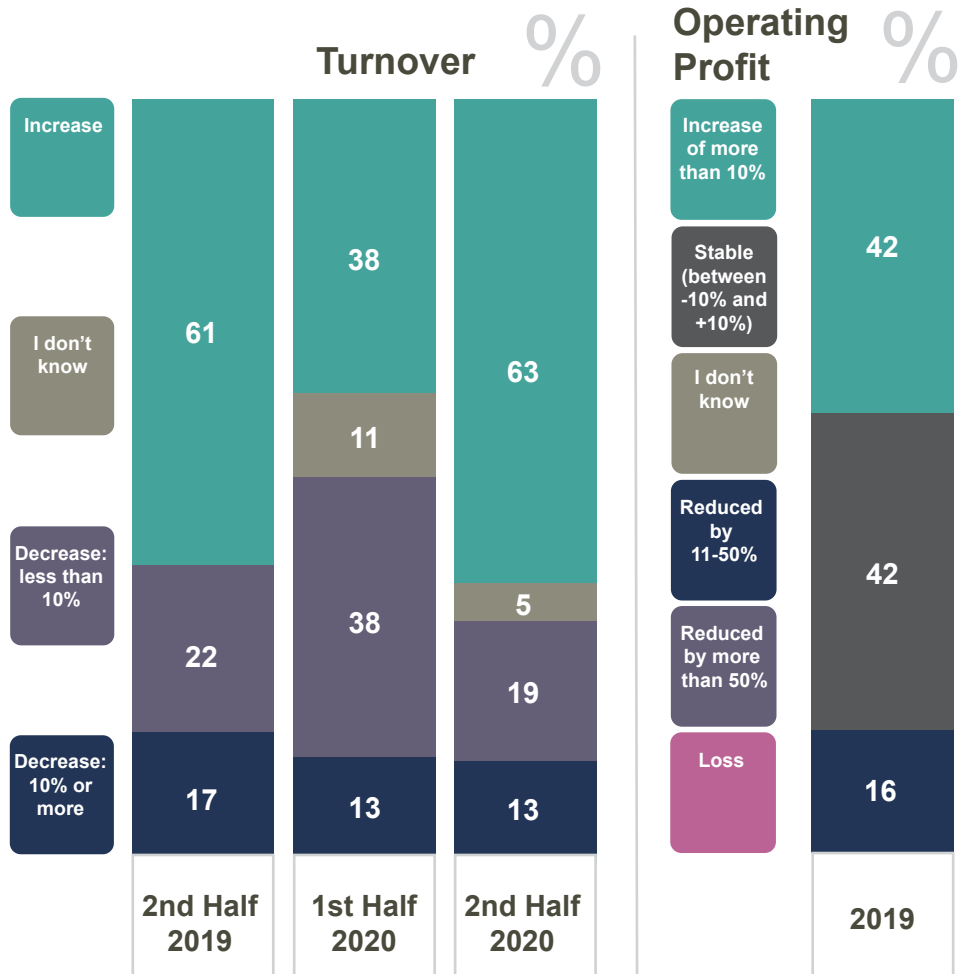
What share of your total space available is used for the respective purposes during your exhibitions?



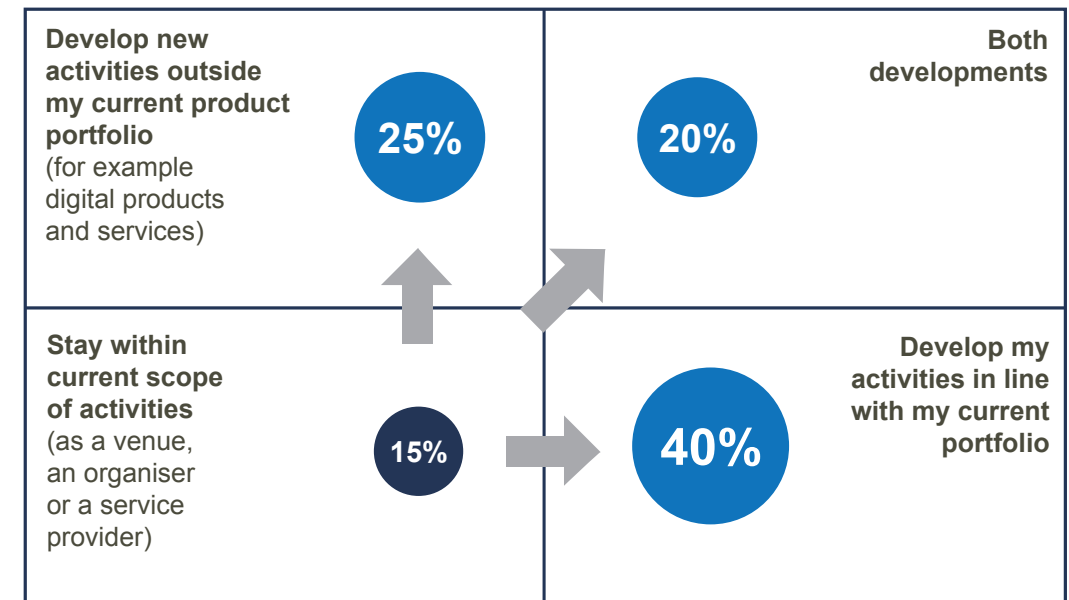
Detailed results for Thailand



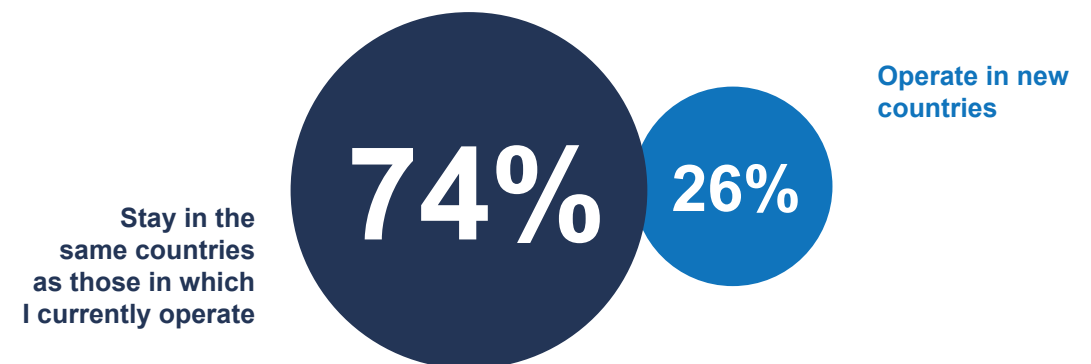
Financial expectations of Thailand exhibition companies compared to previous years



Current strategic priorities related to the range of activities



Current strategic priorities related to geographic exposure



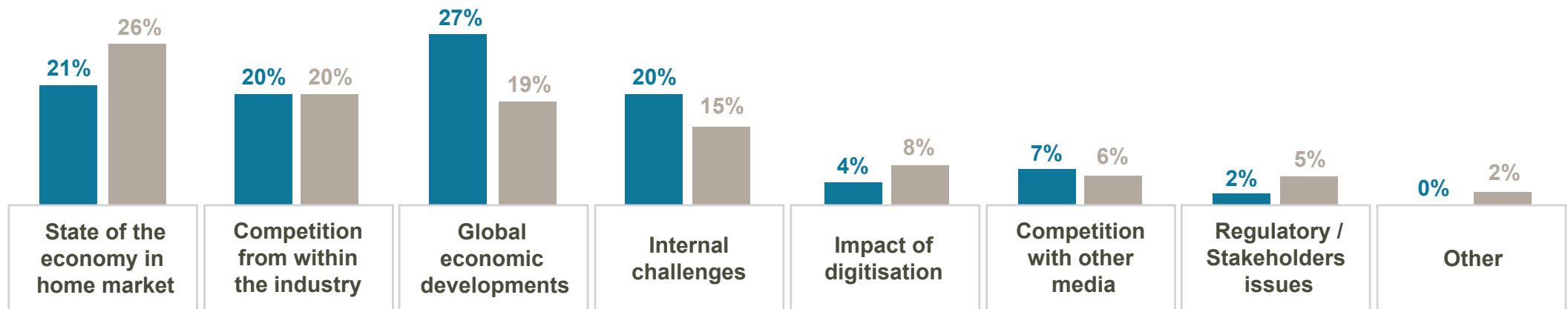
Detailed results for Thailand



Most important business issues in the exhibition industry in Thailand and globally

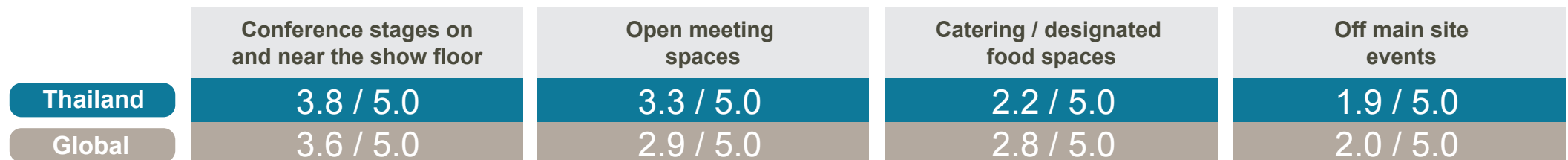
Thailand

Global

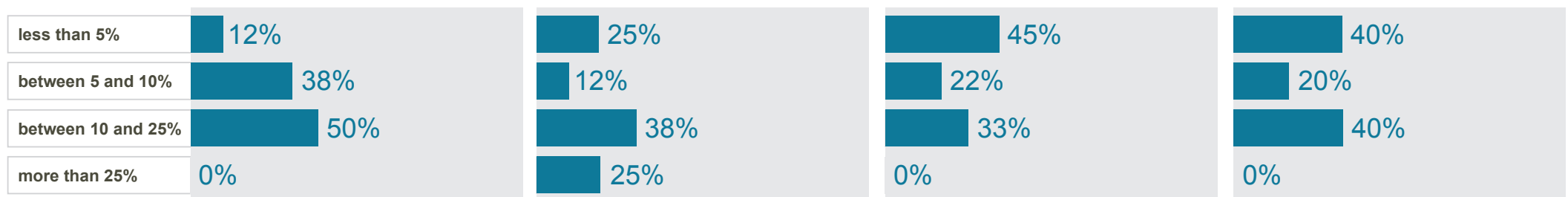


Evolution of the business model for exhibitions

To what degree have you added the following elements to your shows?

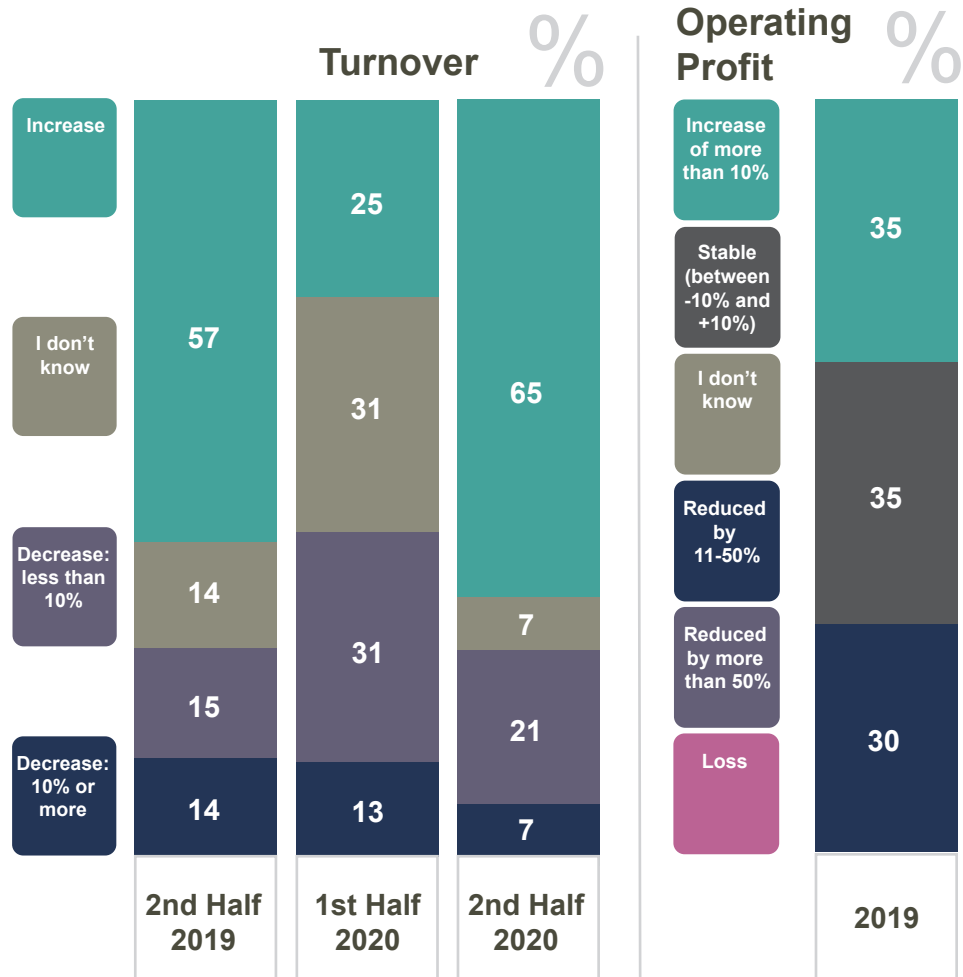


What share of your total space available is used for the respective purposes during your exhibitions?

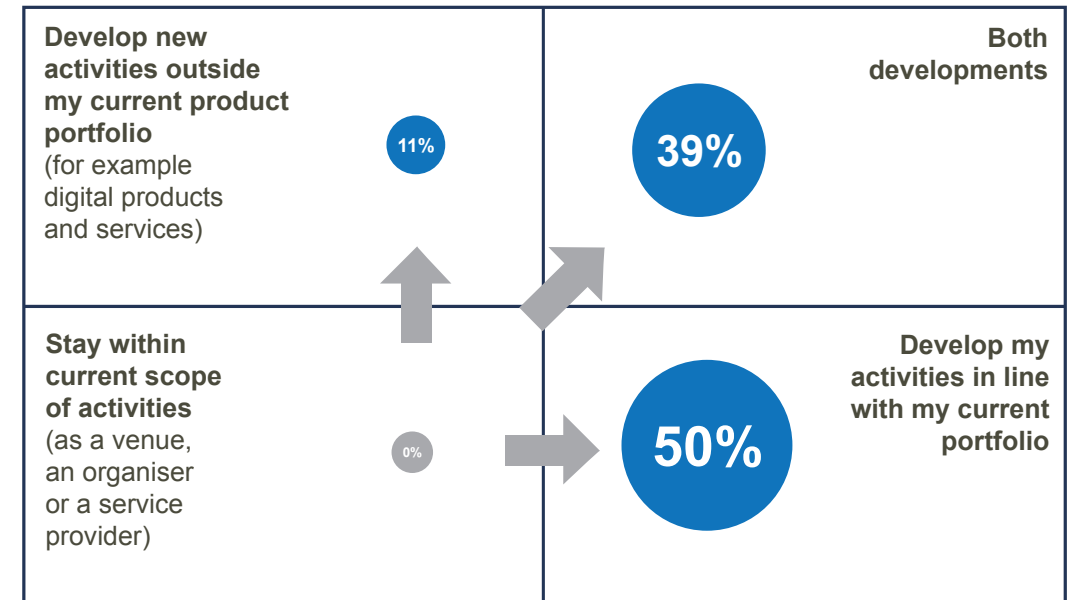


Detailed results for other countries in Asia - Pacific

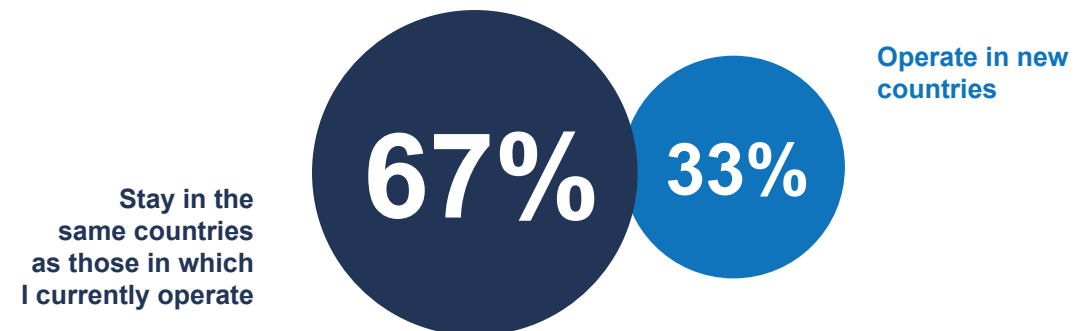
Financial expectations of other countries in Asia - Pacific exhibition companies compared to previous years



Current strategic priorities related to the range of activities



Current strategic priorities related to geographic exposure

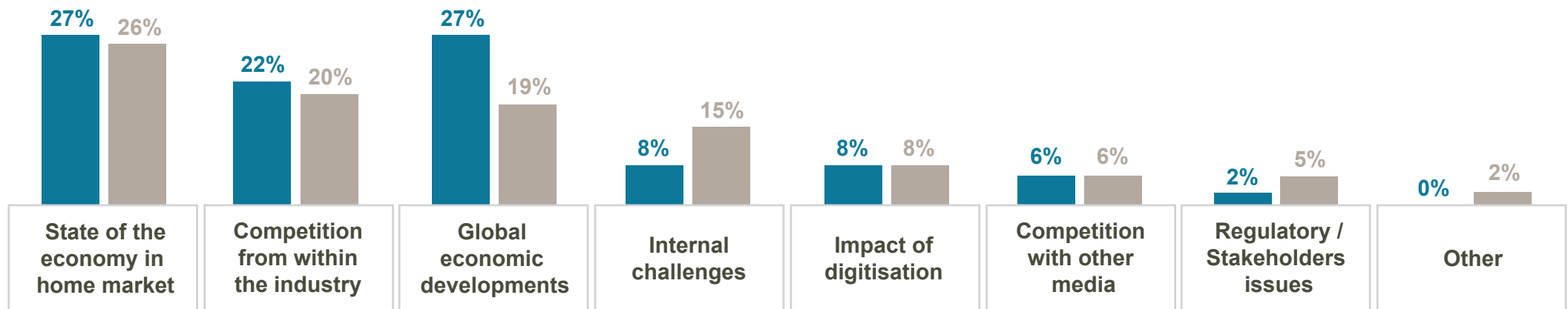


Detailed results for other countries in Asia - Pacific

Most important business issues in the exhibition industry in other countries in Asia - Pacific and globally

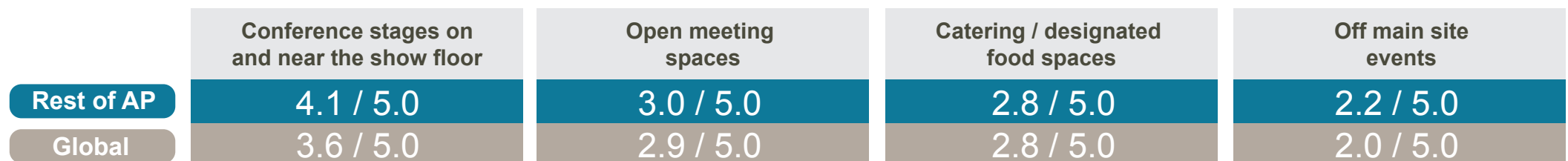
Rest of AP

Global

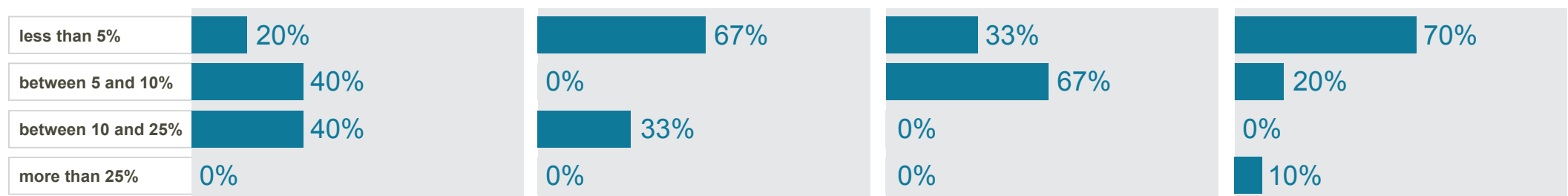


Evolution of the business model for exhibitions

To what degree have you added the following elements to your shows?



What share of your total space available is used for the respective purposes during your exhibitions?



The Global Barometer survey has been measuring the pulse of the exhibition industry since 2008. **This 24th survey was concluded in early January 2020, which means that the current “Wuhan virus” issue was not yet known.**

The survey was answered by a record number of 438 companies from 70 countries / regions. The results are detailed for 22 geographical zones, including 18 major countries and regions markets.

The survey results reveal a positive outlook in terms of **operating profit**, with at least 70% of companies in each of the four regions maintaining a good level of performance in 2019 compared to 2018. In terms of gross turnover, a majority of companies from all regions also expect increases. However, strong levels of uncertainty can be noticed in many countries, especially in Asia/Pacific and Latin America.

When asked about the **most important issues for their business** in the coming year, companies remain concerned about the following 4 topics: “State of the economy in home market” (26% in the current survey, up 2% compared to 6 months ago), “Competition from within the industry” (20% in the current survey, up to 1% compared to 6 months ago), “Global economic developments” (19% in the current survey, same compared to 6 months ago) and “Internal challenges” (16% in the current survey, down 1% compared to 6 months ago).

In terms of **strategy**, in all regions, a large majority of companies intend to develop new activities, in either the classic range of exhibition industry activities (venue/organiser/services), or outside of the current product portfolios, or in both. In terms of geographical expansion, on average

globally, more than one company out of three declares an intention to develop operations in new countries.

Finally, the survey tackled the evolution of the business model for exhibitions and the levels of implementation of specific features; results indicate a major use of “conference stages on and near the show floor” (3.6 out of a scale of 5), followed by “open meeting spaces” (2.9) and “catering/ designated food spaces” (2.8). “Off main site events” are, in comparisons, less often implemented (2.0). Results also indicate that these features occupy on average less than 10% of the total space of the exhibitions.

THANK YOU TO ALL SURVEY PARTICIPANTS FOR YOUR CONTRIBUTION!

THE NEXT GLOBAL BAROMETER SURVEY WILL BE CONDUCTED IN JUNE 2020 – PLEASE PARTICIPATE!

Appendix: Number of survey replies per country

Total = 438 (in 70 countries/regions)

North America	40	Europe	102	Middle East	27
Canada	4	Albania	1	Algeria	1
Mexico	21	Austria	1	Bahrain	1
USA	15	Belgium	2	Iraq	1
		Croatia	1	Jordan	1
Central & South America	77	Czech Republic	1	Kuwait	2
Argentina	10	France	2	Lebanon	2
Bolivia	5	Georgia	1	Oman	1
Brazil	13	Germany	17	Qatar	3
Chile	6	Greece	4	Saudi Arabia	5
Colombia	15	Hungary	2	United Arab Emirates	10
Costa Rica	2	Italy	12		
Ecuador	6	Poland	3	Asia / Pacific	162
El Salvador	3	Portugal	3	Australia	27
Guatemala	2	Romania	1	Azerbaijan	2
Honduras	2	Russia	22	China	35
Panama	4	Serbia	1	India	26
Paraguay	1	Slovenia	1	Indonesia	10
Peru	4	Spain	2	Japan	14
Uruguay	4	Sweden	3	Kazakhstan	1
		The Netherlands	4	Macau	10
Africa	29	Turkey	4	Malaysia	2
Egypt	2	Ukraine	1	New Zealand	1
Morocco	1	United Kingdom	13	Pakistan	2
Rwanda	1			Philippines	1
South Africa	25			Singapore	4
				South Korea	4
				Thailand	21
				Vietnam	3

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